ENG 2 - CONFIRM STRATEGY AND APPROACH

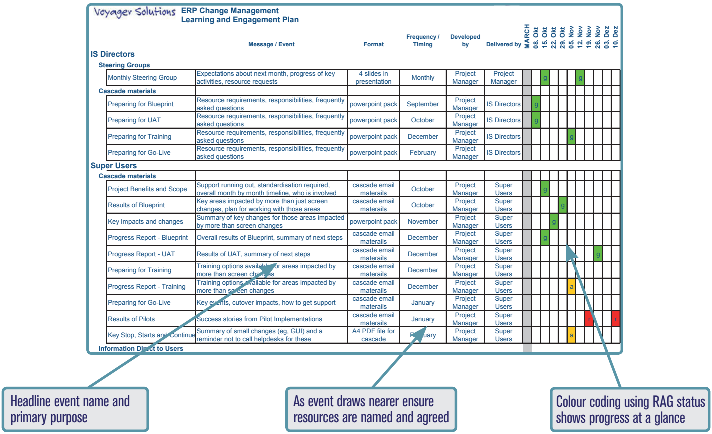
CREATE A SIMPLE, BUT LOGICAL TIMELINE OF ALL ENGAGEMENT ACTIVITIES

The definition of stupidity is doing something over and over again and expecting different outcomes. A good engagement and learning strategy will contain a mixture of methods that have worked with those types of audiences before, and additional formats where required. Creating a single view with audiences, messages, formats and timings brings together all of these things.

ENG 2 - Using the audience groupings and a timeline, confirm the messages that will need to be communicated or engagement activities at points along the timeline. If you can, create a single view of this which will show how audiences will receive all types of events. For the engagement and learning events, include details such as formats, who the developers are and who will deliver if you can.

ENGAGEMENT PLAN

The engagement and learning plan should contain the single snapshot of all of the engagement and learning events planned for the programme. It is a great way of engaging the project team and the impacted businesses to give them confidence that the engagement and learning activities are under control.



Voyager Solutions ERP Change Management
Learning and Engagement Plan

	Message / Event	Format	Frequency / Timing	Developed by	Delivered by	MARCH	08. Okt	15. Okt	22. Okt	29. Okt	05. Nov	12. Nov	19. Nov	26. Nov	03. Dez	10. Dez
IS Directors																
Steering Groups																
Monthly Steering Group	Expectations about next month, progress of key activities, resource requests	4 slides in presentation	Monthly	Project Manager	Project Manager			g				g				
Cascade materials																
Preparing for Blueprint	Resource requirements, responsibilities, frequently asked questions	powerpoint pack	September	Project Manager	IS Directors		g									
Preparing for UAT	Resource requirements, responsibilities, frequently asked questions	powerpoint pack	October	Project Manager	IS Directors		g									
Preparing for Training	Resource requirements, responsibilities, frequently asked questions	powerpoint pack	December	Project Manager	IS Directors						g					
Preparing for Go-Live	Resource requirements, responsibilities, frequently asked questions	powerpoint pack	February	Project Manager	IS Directors											
Super Users																
Cascade materials																
Project Benefits and Scope	Support running out, standardisation required, overall month by month timeline, who is involved	cascade email materails	October	Project Manager	Super Users			g								
Results of Blueprint	Key areas impacted by more than just screen changes, plan for working with those areas	cascade email materails	October	Project Manager	Super Users					g						
Key Impacts and changes	Summary of key changes for those areas impacted by more than screen changes	powerpoint pack	November	Project Manager	Super Users				g							
Progress Report - Blueprint	Overall results of Blueprint, summary of next steps	cascade email materails	December	Project Manager	Super Users			g								
Progress Report - UAT	Results of UAT, summary of next steps	cascade email materails	December	Project Manager	Super Users									g		
Preparing for Training	Training options available for areas impacted by more than screen changes	cascade email materails	December	Project Manager	Super Users											
Progress Report - Training	Training options available for areas impacted by more than screen changes	cascade email materails	December	Project Manager	Super Users						a					
Preparing for Go-Live	Key events, cutover impacts, how to get support	cascade email materails	January	Project Manager	Super Users											
Results of Pilots	Success stories from Pilot Implementations	cascade email materails	January	Project Manager	Super Users								r			r
Key Stop, Starts and Continue	Summary of small changes (eg, GUI) and a reminder not to call helpdesks for these	A4 PDF file for cascade	February	Project Manager	Super Users						a					
Information Direct to Users																

ENG 3 - CONFIRM CATALOGUE, STANDARDS AND ENVIRONMENT

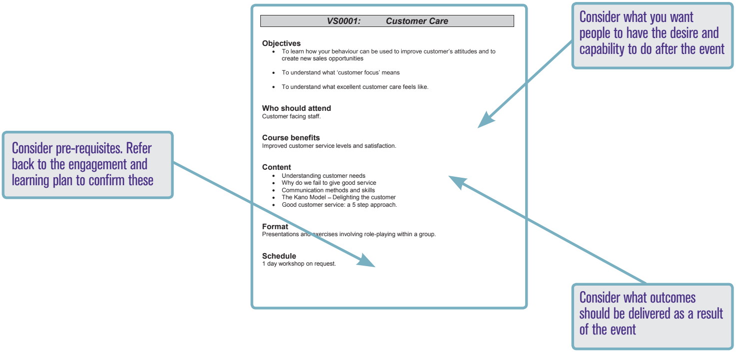
ENGAGE COMMUNICATORS, MATERIAL DEVELOPERS AND AUDIENCES WITH A CATALOGUE

For more complex engagement events, and for learning events, a catalogue can ensure that each course has been thought through in terms of outcomes, objectives, formats, timings and prerequisites. Getting into a 'catalogue' state of mind can really focus the attention on delivering professional quality events and interactions. It can put a stake in the ground early about what audiences, sponsors and other stakeholders can expect from the project.

ENG 3 - For major events and for learning interventions, create a catalogue which specifies in a lot more detail what each course will cover. For technical or process service based courses, work with the process team members (i.e. those who understand the future processes/services) to define which groupings of processes or services will be covered by each course, and what types of data or environment will be required. Ensure that you are clear on what people need to be able to do differently after each course or event. Think about 'what you want these people to do differently when they come into work'.

THE CATALOGUE OF BRILLIANT FORMATS

The catalogue should be the basis of 'selling' the events and courses to stakeholders who are the recipients, and to people who will need to be involved in creating the content.



VS0001: Customer Care

Objectives

- To learn how your behaviour can be used to improve customer's attitudes and to create new sales opportunities
- To understand what 'customer focus' means
- To understand what excellent customer care feels like.

Who should attend
Customer facing staff.

Course benefits
Improved customer service levels and satisfaction.

Content

- Understanding customer needs
- Why do we fail to give good service
- Communication methods and skills
- The Kano Model – Delighting the customer
- Good customer service: a 5 step approach.

Format
Presentations and exercises involving role-playing within a group.

Schedule
1 day workshop on request.

ENG 4 - PREPARE LOGISTICS AND DEVELOP

PLAN EARLY AND DEVELOP BRILLIANT FORMATS

Project constraints often mean that we cannot always give people enough notice that they are required to attend an event. However, the process of mapping people to events can start from a very early stage. If you start by mapping events to departments, and then to teams, and then to people, you will eventually finish up with a mapping of people to events. This can be used to create a full engagement or training curriculum, which is a basis for invites, and also for development plans for the materials.

ENG 4 - Create a matrix that maps the courses or events to departments, teams and people. Use this to estimate how many people will need to be on each event based on room capacity, and cluster people into groupings which can be used to confirm course dates. This information can then be used to build up a development plan for any materials, based on the delivery dates of each of the courses. Ensure that the Subject Matter Experts (SMEs), trainers, content developers and audiences are all on the same page, issue the plan, and monitor the development closely.

THE DEVELOPMENT PLAN AND COURSE MAPPINGS

Use a version of the OJT matrix (JOB 1) to map people to courses. Monitor the materials development with a plan.

Changes or delays should be reflected in the engagement and learning plan

Course	Topics	Format	Duration	Development Ratio	Development Time	Developer	Draft	Design	Develop	Review	Deliver
Accounts Payable Accounting	1. Invoice Verification 2. Journal Entry 3. Inter-company	Classroom with system	16 hours (2 days)	18 hours' development: 1 hour's delivery	16 x 18 hours	**John Smith**	**03 March**	**17 March**	**31 March**	**07 April**	14 April
Accounts Payable On-line Manual	As Above	Intranet	8 procedures	1 day for procedure	8 x 8 hours	**Peter Gibbons**	**03 March**	**10 March**	**17 March**	**24 March**	31 March
Accounts Payable Accountant: End to End Process Training	1. The Procurement Process 2. The AP Process 3. Procure to Pay	Seminar	16 hours (2 days)	8 hours' development: 1 hour's delivery	8 x 8 hours	**Jane Moore**	**03 March**	**10 March**	**17 March**	**24 March**	31 March
Customer Service Representative		Classroom	16 hours (2 days)	4 hours' development: 1 hour's delivery	16 x 4 hours	**Anne Roberts**	**03 March**	**10 March**	**17 March**	**24 March**	31 March

Summarise the curriculum here

It is critical to build in time for review as last minute technological changes are able to be incorporated

ENG 5 - DELIVER, EVALUATE AND IMPROVE

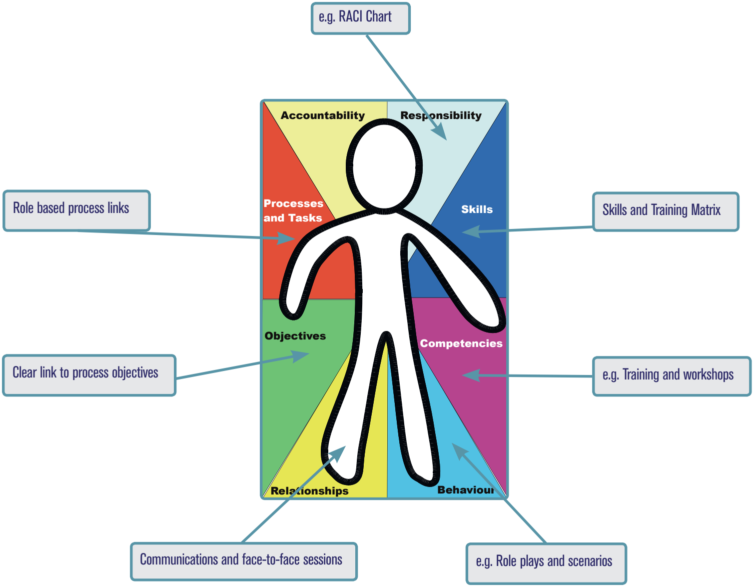
DELIVER BRILLIANT MATERIALS WITH PASSION AND EVALUATE

Wherever change is concerned, we often face resistance from the people who are impacted. As the person sending out these messages or scheduling the courses, the way that you deliver the events is just as important as the messages within them. Question the relevance of every format to the audiences, and be prepared to adapt if necessary.

ENG 5 - Deliver the messages or events with passion and in the most engaging ways possible. If you are distributing the messages via a technology, such as eLearning, make sure that people know how to access and use the technologies. To evaluate the success of the messages or events, assess on the traditional measures such as quality of the room, instructors and materials, but assess whether the individuals are 'job ready' – can they go back to work and perform the key tasks that are expected of them?

USING ROLE BASED MATERIALS

Formats should be produced which focus directly on "job profile" type features such as new skills, competencies, behaviours and relationships.



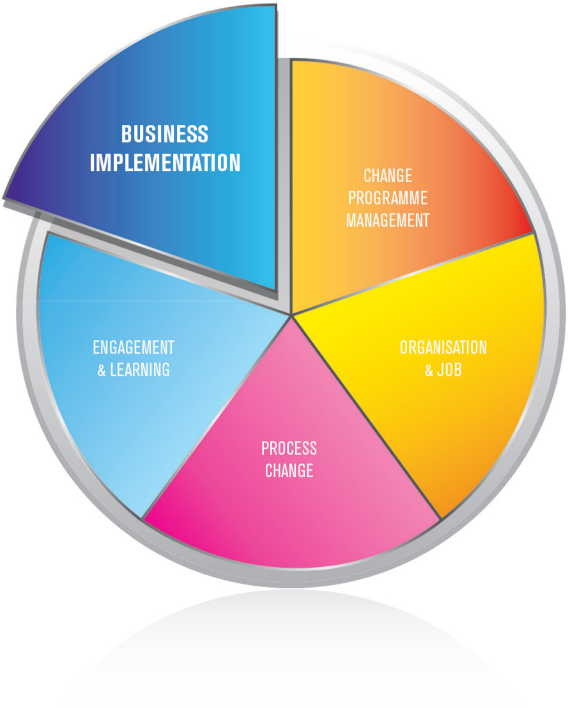
BUSINESS IMPLEMENTATION

KEY ACCELERATORS

Use these accelerators to develop the mechanisms that are needed to engage with the impacted businesses to ensure that they are bought into and deliver the changes that are expected of them.

IMP 1 – Establish governance
IMP 2 – Conduct implementation workshops
IMP 3 – Develop business readiness checklists
IMP 4 – Monitor business actions

BUSINESS IMPLEMENTATION



IMP 1 - ESTABLISH GOVERNANCE

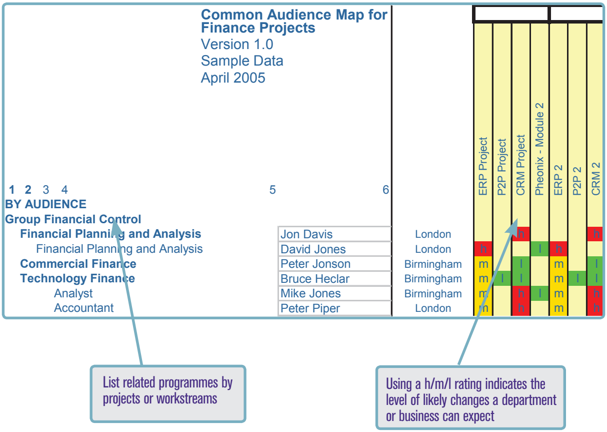
FIND THE PEOPLE WHO NEED TO DO THINGS FOR THE GO-LIVES

Projects without an effective governance structure or an accurate understanding of the impact of the change are destined to fail. It is key for a project to identify the right local people to deliver the change. This will typically include asponsor with sufficient clout to drive the change, Subject Matter Experts (SMEs) with the knowledge to inform decisions and business leads to drive the delivery of business activities.

IMP 1 - Get hold of a project plan, and set up meetings with the project team members to determine which parts of the business they impact, and what types of activities they will need the local business contacts to do for them to prepare for the Go-Live. This could include attending key project events like testing, signing off documents or performing local actions. From these discussions, build up a matrix which shows which projects or work streams will impact which parts of the business.

PROJECT IMPACTS MAP

The mapping of projects to businesses can be used as a way of showing how a project or a set of projects will impact the businesses. Using a high/medium/low scale, it can be depicted as a temperature map to show the businesses who have a lot of activities at the same time.



IMP 2 - CONDUCT IMPLEMENTATION WORKSHOPS

LOOK AT THE PLAN FROM THE BUSINESS POINT OF VIEW

Most projects will need the impacted businesses to make local changes or support local activities to contribute to Go-Live. Many project managers and project team members make the mistake of sending businesses pages of project plans, with technical descriptions and activities and expect them to decipher these into a list of local tasks. What is needed is a practical discussion in business terms about the specific local activities in a form that they will understand and can use.

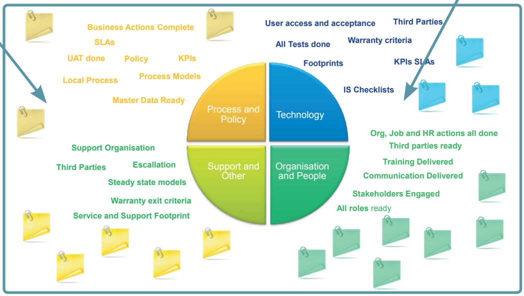
IMP 2 - Set up a workshop with the project team members who need actions performed by the impacted businesses, and with representatives from the impacted businesses themselves. Ask the project team members to present each activity, and to explain what they are expecting the impacted businesses to do locally to prepare for the changes. Throughout the workshop, ask the businesses to write down what they think they will need to do, and stick them on posters. Create a set of actions by business which forms the basis of an Implementation Plan.

IMPLEMENTATION WORKSHOP POSTER

Poster formats work well for engaging the businesses to define local actions required. These should broadly be organised into process, people and technology actions but should be as practical as possible.

Be as specific and practical as possible with the activities mapped

Mapping these activities during the workshop drives a meaningful discussion about the role of the impacted business in delivering the change



IMP 3 - DEVELOP A BUSINESS READINESS CHECKLIST

GET THE PEOPLE WHO HAVE ACTIONS TO SAY WHAT THEY ARE

Most projects have a defined point at which the new processes, systems or services are 'enabled'. The decision to do this should be made between the project, and the impacted businesses. Using an agreed set of criteria to support this decision is a powerful way of focusing everyone on what actions they have, and on the importance and implications of saying 'yes' to the Go-Live. The more engagement and involvement by the decision makers in the definition of the criteria – the better.

IMP 3 - From the business actions, work out what checklist of actions / criteria need to be complete for each business area in order for them to feel comfortable for Go-Live. This business readiness checklist should be organised into people, process, technology and environmental criteria, and should include everything that the businesses need to have ticked off before they are ready to accept the new processes, systems or services.

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BUSINESS READINESS CHECKLIST

The business readiness checklist should contain yes or no criteria where possible, using a red / amber / green status. Items with a green status are at an acceptable level for Go-Live, amber items are late, but have a plan in place, and red items are those which are currently preventing the Go-Live.

Contents usually cover process, people and technology criteria (eg. communications, training, job and role, engagement, hardware etc.)

Impacted stakeholders or businesses should be identified here

Go-Live Checklist for Implementations Version 1.0

	TOTAL PICTURE	Shared Services	Procurement	Data Team	Business Partners	SPAIN	FRANCE	BENELUX	SWITZERLAND	GER, DEN, AUS	ITALY
		a	a	a	a	a	a	a	a	a	a
Project Benefits Confirmed and Vision Principles agreed	a	g	g	g	g	a	a	a	a	a	a
Organisational changes have been affected	a	r	g	r	r	a	g	a	a	a	a
System and User Implications Identified	a	a	a	r	r	a	a	a	a	a	a
Users are trained on the processes and system	a	a	g	r	r	a	a	a	a	a	a
Business Process Changes agreed and conducted	a	a	a	r	r	a	r	a	a	a	a
Communication to all stakeholders delivered	a	r	r	r	r	a	a	a	g	g	g
Data cleansed, verified and signed off	a	a	g	r	r	a	a	a	a	a	a
Post implementation support in place	a	a	g	r	g	a	a	a	a	a	a
System tested and accepted	r	a	g	r	r	a	a	a	a	a	g
Cut-over completed and legacy systems decommisssioned	a	a	a	r	r	a	a	a	a	a	g
Facilities, Hardware and additional equipment delivered	r	a	a	r	r	g	g	g	g	g	g
Other projects and initiatives identified and aligned	r	a	g	r	r	a	a	a	a	a	a

Contents of this checklist should align to the activities delivered by the Implementation Plan. If there is something on the checklist there should be corresponding line items on the Implementation Plan.

RAG status is typically populated and updated in joint review meetings by the project and impacted businesses

IMP 4 - MONITOR BUSINESS ACTIONS

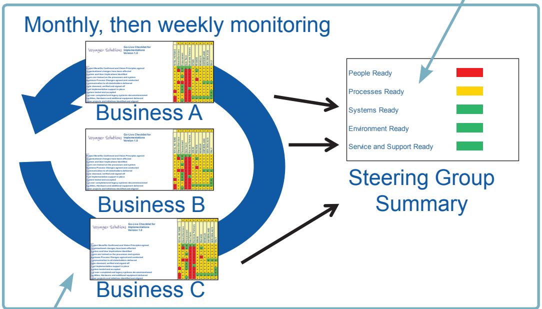
REVIEW. REVIEW. REVIEW. GO-LIVE.

In many cases, a project will have a Go-Live or a set of Go-Lives within its original plans, and a checklist that is used at the point of Go-Live. These are often used a few weeks before the Go-Live. To maximise the focus and involvement of these, it is better to establish the governance and meeting structures for these several months in advance, so that businesses are focused early on what boxes they will need to tick off to make a successful Go-Live happen.

IMP 4 – Identify the local business leads or contacts who will need to own business actions as early as you can in the project. If possible, establish criteria for earlier project stages that need business involvement, and build 'gate' discussions at these points. These can compliment the project status discussions by focusing on what the businesses need to have 'ticked off' at every project stage. For the Go-Live itself, set up monthly, then weekly, then daily meetings to get the businesses to present where they are against the criteria, and what business and project actions are required for any red or amber criteria.

IMPLEMENTATION ACTIONS CYCLE

Status can be considered to reflect progress for the overall project



Meetings should be held around the Business Readiness Checklist on a regular basis for each impacted business

CONTACT DETAILS

HOW TO GET IN TOUCH

Don't hesitate to contact us if you would like any help or support applying the methodology and tools on your journey. We'd be delighted to talk to you about taking it forward.

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WITH SPECIAL THANKS

Thank-you to the Voyager Team Members who have been involved in the production of this guide.

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Michelle Hill
Liam Higgs-Howson
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Rebecca Wilson
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LEGAL INFORMATION

FIRST PUBLISHED IN GREAT BRITAIN 2013

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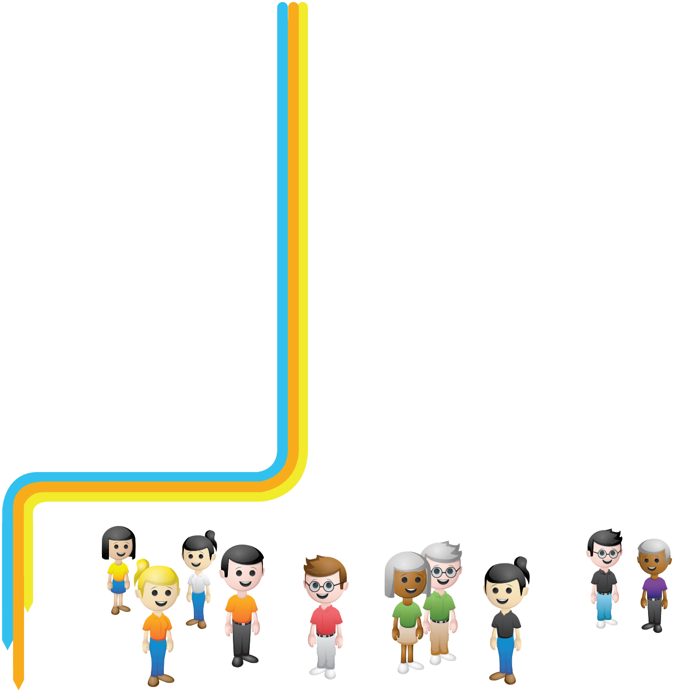

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ISBN 978-0-9537388-1-6
9 780953 738816 >