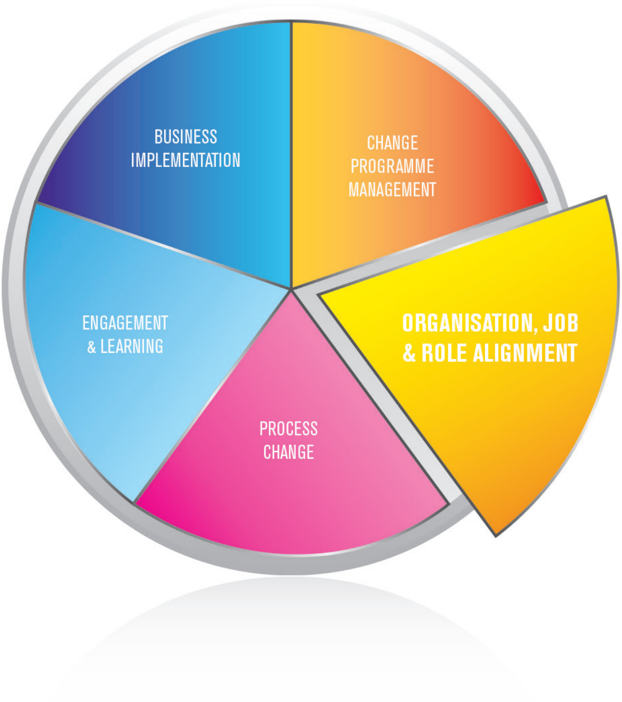
ORGANISATION, JOB AND ROLE ALIGNMENT



ORG 1 - ESTABLISH GOVERNANCE FOR DECISIONS

GET EVERYONE IN THE MOOD FOR DECISION MAKING. AGREE THE MECHANISMS

For those areas of the organisation that need to change, there will be strong opinions about what the final structure should look like. This is an area where politics can take over and undermine the best options for the company as a whole. In some cases, a whole new organisation design will be required. A good solid process for getting the key players around a table and making decisions is critical.

ORG 1 - Create a single log where the key decisions that need to be made are recorded, and the progress of these are tracked. If a new organisational structure is being introduced, conduct discussions with the leadership team using the model to identify where decisions will need to be made in terms of where key tasks are performed. Book recurring meetings where options can be discussed and key decisions can be formalised.

THE ORGANISATIONAL GOVERNANCE MODEL & DECISIONS LOG

The decisions log records where specific decisions need to be made and who needs to make them. An initial meeting is conducted with the key decision makers to agree the approach and to create a common set of criteria which is used as a basis to make all decisions. (e.g. Company objectives, corporate guidelines on spans of control). All decisions should meet these criteria.

r Key decision not agreed
a Key decision agreed but not signed off by individual
g Key decision signed off

Decision No	Org Ref	Key Decision / Assumption	Key Impacts	Dept 1	Dept 2	Dept 3	Dept 4	Other
Signed off at the meeting on 30th May 2012								
2	5.10	Should reporting be conducted locally or centrally, or spread across IS, Finance and Procurement	Existing "As Is" reports will form the basis of activity in the short term. Limited headcount reduction will be achieved until new systems are introduced.		g			
4	6.00	Should master data be centralised. Decision to centralise in Finance.	FTE movements but no operational impacts.			r	a	a

Outline the decision required or the assumption which requires confirmation. If there are options defined, summarise them here

Summarise the impacts of each of the options for each stakeholder area. This will enable a balanced, considered decision to be reached

ORG 2 - REDESIGN ORANGISATION AND ROLES

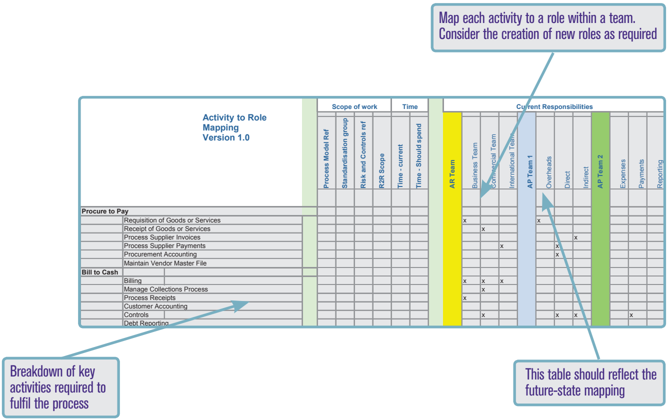
ACTIVITIES MAKES ROLES. ROLES MAKE JOBS. JOBS MAKE ORGANISATIONS.

At a basic level, an organisational chart shows us how activities have been divided off across an organisation. Jobs and roles tell us which activities people will own when they come into work every day. As we redesign the organisation, we are constantly looking at how future activities will need to be performed by today's, or future roles. These should be driven by the need to meet the expectations of all customers and stakeholders Service Level Agreements (SLAs).

ORG 2 - Create a matrix which takes the future state activities that will need to be performed and map them to the teams that are present today, or new teams, if determined. Map all activities to existing or future teams in order to figure out how to allocate activities within a team. Use a workshop approach to determine who the team is in existence for (the stakeholders and expectations of the team), what criteria to use when allocating roles (e.g. maximise multiskilling, segregation of duties) and how roles need to map to activities.

ROLE PROFILING APPROACH

The activity to role matrix can be used at a number of levels to layout the emerging organisational design. A workshop based approach very similar to the governance used at ORG 1 is applied on a lower level to make role decisions.



ORG 3 - DEVELOP ROLES LAYER BY LAYER

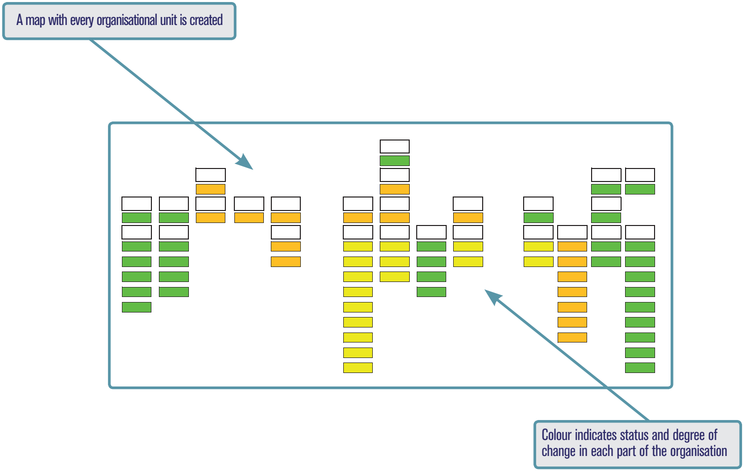
FOR EACH LAYER, MAP ROLES TO PEOPLE AND PLAN FOR IMPACTED AREAS

For organisational changes that impact a whole department, the best way to handle the design is to design and recruit the top level, and then involve them in the design and recruitment for the layer below. Repeat this as we move from Director to staff level. This takes longer than a 'big bang' restructure, but maximises involvement and accountability for the new operation.

ORG 3 - Create a plan which will cascade the organisational restructure top down, following a broad pattern of: activity design; organisation and role decision making announcement; and then implementation for each level. Use the governance mechanisms to make decisions at each level, and the activity to role matrix to drive out where new roles will be required. In a secure room, build up an organisational chart to show impacted areas (e.g. new teams, 'lift and shift' changes) and use them to drive decisions and progress.

CASCADE APPROACH FOR IMPACTED BUSINESS AREAS

Some operating model projects have defined activity for organisational changes, but it is good practice to structure the organisation layer by layer. A visual representation to show the evolving organisation is a great way to engage decision makers and HR.



ORG 4 - MONITOR HR ACTIONS FOR IMPACTED AREAS

USE ROLE PROFILES TO EXPLAIN, FORMALISE AND TRACK CHANGES

Role profiles are used to recruit staff into positions, either from external or internal sources (from other departments). Organisations will use specific standards To document these, and follow a HR defined process before, during and after recruiting staff. As the organisational structure is finalised, it becomes important to track the progress of these activities, taking into account any timelines.

ORG 4 - Document role profiles with the Leadership team and work with HR to ensure role profiles meet company standards and are benchmarked for salaries and benefits. Create a tracker to monitor all the assessment, recruitment and HR activities which need to be performed by various stakeholders, keeping track of progress on a daily basis. Ensure all stakeholders are aware of the activities that they are responsible for.

HR ACTIVITY STATUS TRACKER

The HR tracker records the activities to be performed to recruit staff into the organisation, and tracks progress daily. The new structure, with new role titles, are shown with the HR activities.

This can also be used to monitor assessment activities.

Be specific with required actions and continue to drive progress

HR Activity Status Tracker

POSITION STATUS AND NEXT STEPS

STATUS
FILLED = position filled
INTERNAL = internal recruitment process in progress
EXTERNAL = external recruitment process in progress
HRF = HRF required but not in place yet
ACTION = further action required

	Name	FILLING THE POSITION	Status	Internal / External	Action	Next step date	Decision Maker	Decision Date
SSC Manager	VACANT		RECRUIT		Interview with Simon		SI / TM	
Cash Manager								
Cash and Bank Accountant	VACANT							
Cash Associate	Jon Davis		INTERNAL					
Cash Associate	David Jones		INTERNAL					
Cash Associate	Peter Jonson		INTERNAL					
Cash Associate	Bruce Heclar		INTERNAL					
Cash Associate	Mike Jones		ACTION		Need to define the profile			
Cash Associate	Peter Piper							
Cash Associate	Jane Jones							

Colour coding gives an indication of the overall status at a glance

ORG 5 - LAUNCH AND MONITOR HANDOVER

USE VISUAL TECHNIQUES TO TRACK KEY HANDOVERS OF ACTIVITIES

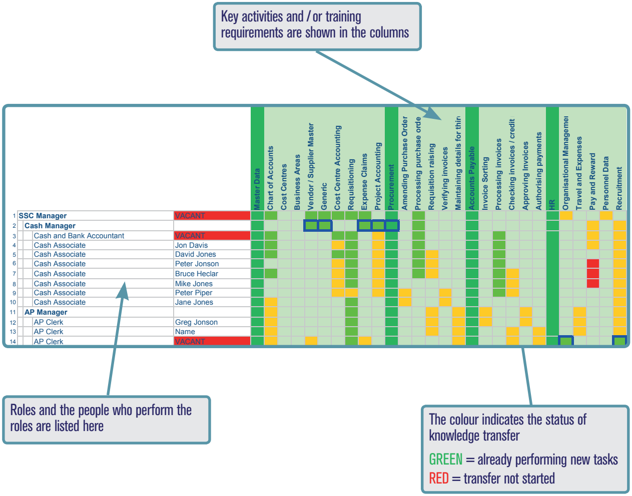
Team activities and staff members may have changed as a result of the organisational changes. Where changes have occurred, knowledge has to transfer from one individual to another. This takes time, so mechanisms have to be put in place to ensure the key activities are learnt and everyday business requirements do not suffer.

ORG 5 - Work with Leaders to document the critical activities and system knowledge that need to be learnt or transfered by the team. Identify staff members in the organisation who are experts in each activity and identify which team members are required to learn which activities.

Monitor and track the ongoing status of the activity transfer for all individuals involved.

THE KNOWLEDGE TRANSFER TRACKER

The Knowledge Transfer Tracker monitors each staff member and their understanding of the activities for which they will become responsible. Individuals are mapped against activities in the form of a matrix, with a simple colour-coding system used to provide a visual representation of progress.



JOB 1 - IDENTIFY MAJOR HR AND ORGANISATIONAL IMPACTS

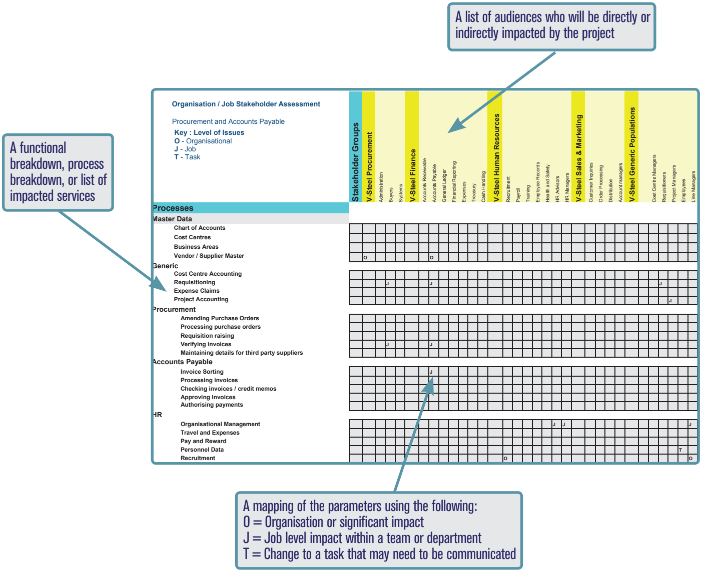
LAY OUT THE IMPACTS ON A MATRIX. WORK ON THE MAJOR IMPACTS IMMEDIATELY

The chances are that you will have entered the project at quite a late stage and already have some change management issues to deal with. It is important to apply a rigorous approach to make sure that any organisational or job related issues are identified. It is also vital that any issues with a long lead time (recruitment, union related) are acted on fast.

JOB 1 - Work with the process team members or subject matter experts to build up a picture of the total processes, services or functionality that will be impacted. Talk to people who understand the business or countries impacted about who the audience groups are. Map the two on a matrix, and conduct discussions to identify the level of change for those audiences, and in particular, the issues which need to be sorted out now, or will take longer.

THE OJT MATRIX

You should conduct practical discussions around the Organisational, Job, Task (OJT) matrix template. This will ensure that a full scope of issues are understood. Significant organisational issues which impact a number of teams are addressed in the ORG section.



JOB 2 - CONDUCT A JOB IMPACT ANALYSIS

WORK OUT WHAT NEEDS TO BE DIFFERENT WHEN KEY ROLES COME INTO WORK EVERY DAY

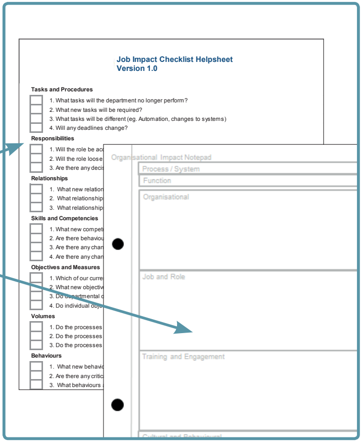
Every time a project is delivered, there are people affected who will need to come into work and do something different. Work out who they are, how they are impacted, and what needs to change, and people will be aligned. A good job impact analysis will cover changes to accountabilities, relationships, objectives, workload, skills and competencies for key roles inside and outside the organisation.

JOB 2 - Use the OJT matrix to work out where there are key roles impacted by the changes. Facilitate a discussion with people who can describe the future processes or services and who can talk through each piece of the future state design. During this discussion, use people who understand how things work today to identify the key impacts. The job impact checklist is a list of key questions that can be used to identify where changes to key roles will be required.

THE JOB IMPACT WORKSHOP CHECKLIST AND NOTEPAD

You should conduct practical discussions around the OJT template. This will ensure that a full scope of issues are understood. Significant organisational issues which impact a number of teams are addressed in the ORG section.

These documents allow us to ensure that all the aspects of key roles have been considered in terms of impacts



We use this document to identify and record changes to:
- Accountabilites
-Responsibilities
-Relationships
-Skills and competencies
-Objectives and measures
-Volumes
-Behaviours

JOB 3 - PLAN AND MONITOR BUSINESS AND HR ACTIONS

MAKE A PRACTICAL, DECISIVE PLAN FOR EVERY IMPACTED AREA

How many times have you been in a meeting where issues have been agreed, but no actions were followed up. This stage is all about making sure that we are clear on which impacted roles need action, and on what specific changes need to be planned in the impacted areas. Actions may also include the need to make specific decisions about responsibilities. It has to be owned by leaders of impacted areas.

JOB 3 - Conduct meetings with local business contacts to agree which local actions are needed to make the changes. Record them on a business action plan. If decisions are required, agree the process for making them, and the required dates for resolution. These actions will contain changes that local leaders need to make, local training courses, local HR actions and local communication tasks.

THE BUSINESS ACTION PLAN

The format of the template can vary, and in some cases, these actions are contained within a Business Readiness Checklist or Business Implementation Plan. They should contain local actions including team communication, local training and local HR activities.

		Week 1	Week 2	Week 3	Week 4	Week 5	Week 6	Week 7	Week 8	Week 9	Week 10	Week 11	Week 12
HR / Change Activities													
Organisation Level													
Workshops to discuss Vendor Master	LINE MGR		■		■		■		■				
AP Role Changes													
Discuss Task Changes with SAP Project	LINE MGR										■		
Discuss Task Changes with Team	LINE MGR											■	
Evaluate Post Clerk responsibilities	MGR / HR										■		
Discuss objectives with individual	LINE MGR											■	
Business Skills Training													
Select Improvement Course	HR							■					
Attend Improvement Course	LINE MGR								■				
Team Responsibilities													
Issues Workshops / Planning													
- responsibility for Advance PO's	LINE MGR								■				
- reporting responsibilities	LINE MGR									■			
- team objectives discussion	LINE MGR										■		
Recruitment													
Clarify policy on Temps	HR					■							
Approach Agency	LINE MGR						■						
Recruit temps	MGR / HR											■	
Union Communication													
Union update meetings	HR					■				■		■	

Ensure resources are allocated to carry out actions and get agreement from leaders and specific action owners

JOB 4 - ENGAGE LEADERS TO DELIVER ACTIONS FOR KEY ROLES

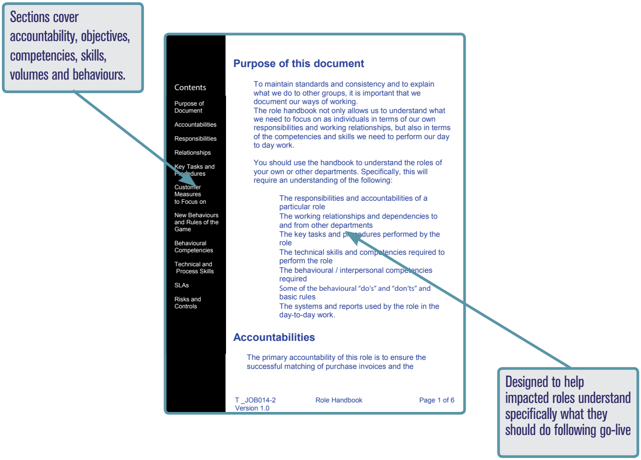
FOR THE KEY IMPACTED ROLES, CREATE PRACTICAL HANDBOOKS TO SUPPORT CHANGES

To make the local changes, operational managers will need an understanding of the new processes or services in a clear format. For significantly impacted roles, create a role based format which is similar to a job profile, but contains information about the aspects of the roles that need to change. This information can then be used for activities, including assessment of people for positions, employee development activity and changes to objectives.

JOB 4 - Setting up a role handbook format for highly impacted roles allows us to communicate the future state design in a format which can make direct changes to people's jobs and roles. If the impacted areas or HR already use job or role profiles, these can be used as a starting point. Work with those who understand the new processes or services to document the aspects of the key roles which will need to change, and use this information to brief leaders, HR or learning solution providers so that the impacts can be resolved.

THE ROLE HANDBOOK

The role handbook summarises what to focus on when performing a role. Only relevant sections are developed, but in some cases the whole document is used to assess people for new roles, where significant changes are required.



Contents

Purpose of Document
Accountabilities
Responsibilities
Relationships
Key Tasks and Procedures
Customer Measures to Focus on
New Behaviours and Rules of the Game
Behavioural Competencies
Technical and Process Skills
SLAs
Risks and Controls

Purpose of this document

To maintain standards and consistency and to explain what we do to other groups, it is important that we document our ways of working.
The role handbook not only allows us to understand what we need to focus on as individuals in terms of our own responsibilities and working relationships, but also in terms of the competencies and skills we need to perform our day to day work.

You should use the handbook to understand the roles of your own or other departments. Specifically, this will require an understanding of the following:

The responsibilities and accountabilities of a particular role
The working relationships and dependencies to and from other departments
The key tasks and procedures performed by the role
The technical skills and competencies required to perform the role
The behavioural / interpersonal competencies required
Some of the behavioural "do's" and "don'ts" and basic rules
The systems and reports used by the role in the day-to-day work.

Accountabilities

The primary accountability of this role is to ensure the successful matching of purchase invoices and the

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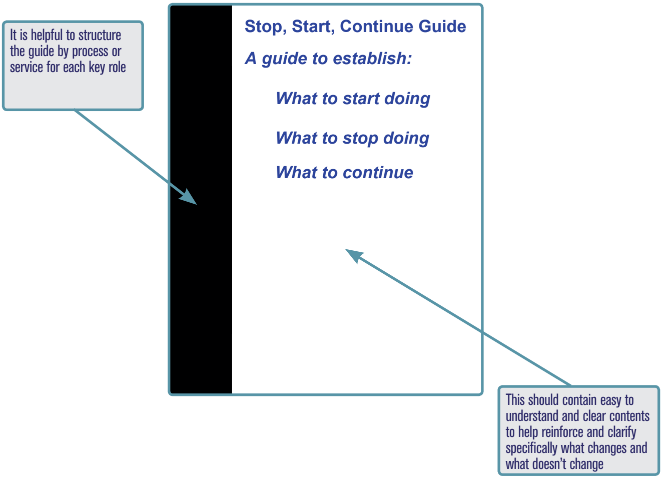
JOB 5 - MAKE THE CHANGES AND EDUCATE KEY ROLES

STOP. START. CONTINUE.

After the Go-Live, it is vital that every role is clear on the new ways of working in terms of what has to stop, start and continue. Using role based formats, is a great way of targeting messages to specific individuals. Using key individuals such as leaders in cascading this information is also a great way of ensuring ownership of the changes.

JOB 5 - From an early stage of the project, you can set up templates to capture the stop, start, continue messages for key roles impacted. The actions can refer to process changes, reporting changes, changes to points of contact, or practically anything that has changed. At an early stage of the project, we can use these to capture role based communication messages. During and beyond the Go-Live, it provides a simple, often last minute format for communicating operational messages.

THE STOP, START, CONTINUE GUIDE



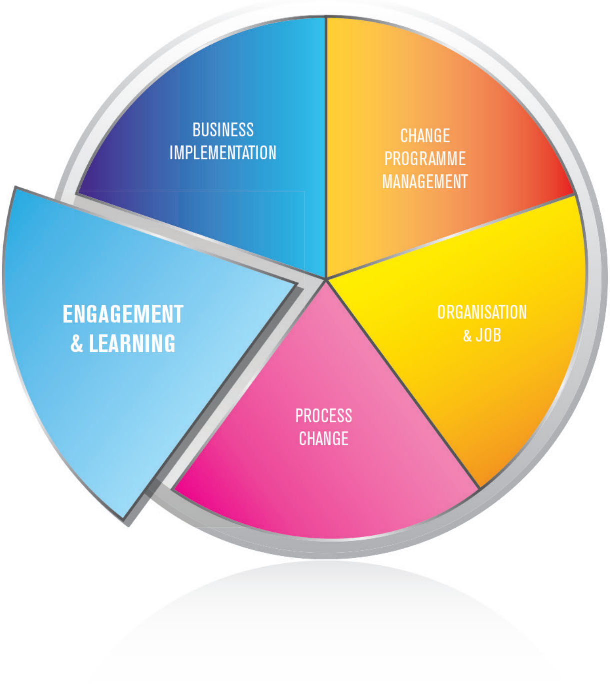
ENGAGEMENT AND LEARNING

KEY ACCELERATORS

Use these accelerators to plan, manage, deliver and evaluate great communication, engagement and learning events.

ENG 1 - Assess audience needs
ENG 2 - Confirm strategy and approach
ENG 3 - Confirm catalogue, standards and environment
ENG 4 - Prepare logistics and develop
ENG 5 – Deliver, evaluate and improve

ENGAGEMENT AND LEARNING



ENG 1 - ASSESS AUDIENCE NEEDS

CONSIDER EVERYONE IMPACTED AND GET OUTCOME AND MESSAGE FOCUSED

If you are reading this guide, the chances are that you will appreciate the need to review audience needs and select the best channels or techniques channels or techniques for engagement and learning. But we need to take that to the next level. Work out what specific outcomes you want to get from the engagement – for training what do we want specific roles to do differently? Think clearly about the messages and channels that would achieve those outcomes.

ENG 1 - Create a breakdown of the impacted stakeholders to understand audiences. For communication and engagement messaging, identify people impacted, sponsors and influencers and use a project timeline to identify what you specifically need them to do during the project in terms of outcomes. For all audiences, identify location, numbers of people and other characteristics. For learning, identify how complex the future stake tasks are and how frequently they will be used. At the same time, evaluate which channels or methods are going to be available to you, and what has worked in the past.

AUDIENCE AND CHANNEL ANALYSIS

A good audience analysis will contain logical groupings of audiences, very outcome focused messages or topics and characteristics that will allow you to select the best methods of delivery. Channel analysis provides an assessment of the communication and training methods that are typically used for those audiences and asks – do existing channels work?

Split the stakeholder groups into appropriate audience groups

Stakeholder Group	No. of People	Business Areas	Complexity	Language	Usage %	Frequency	Typical Channels
SALES							
Order Administration	25	Germany, Construction	Medium	German	80%	Daily	Notice board
Order Administration	30	Germany, Packaging	Medium	German	80%	Daily	Newsletter
Order Administration	40	France, Packaging	Medium	French	80%	Daily	Daily Brief
FINANCE							
Cost Centre Managers	1,000	UK	Low	English	0.05%	Monthly	Notice board
AP Accountant	50	UK	Medium	English	90%	Daily	Newsletter
General Ledger Managers	5	UK	High	English	50%	Daily	Daily Brief

Understanding the numbers of people and their geography will help to determine appropriate channels

For technology driven journeys determine the level of usage and the frequency that audiences will have to use the new system

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																

Headline event name and primary purpose

As event draws nearer ensure resources are named and agreed

Colour coding using RAG status shows progress at a glance

ENG 3 - CONFIRM CATALOGUE, STANDARDS AND ENVIRONMENT

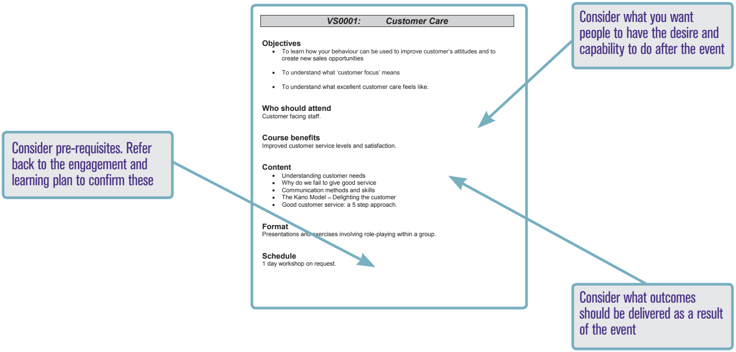
ENGAGE COMMUNICATORS, MATERIAL DEVELOPERS AND AUDIENCES WITH A CATALOGUE

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

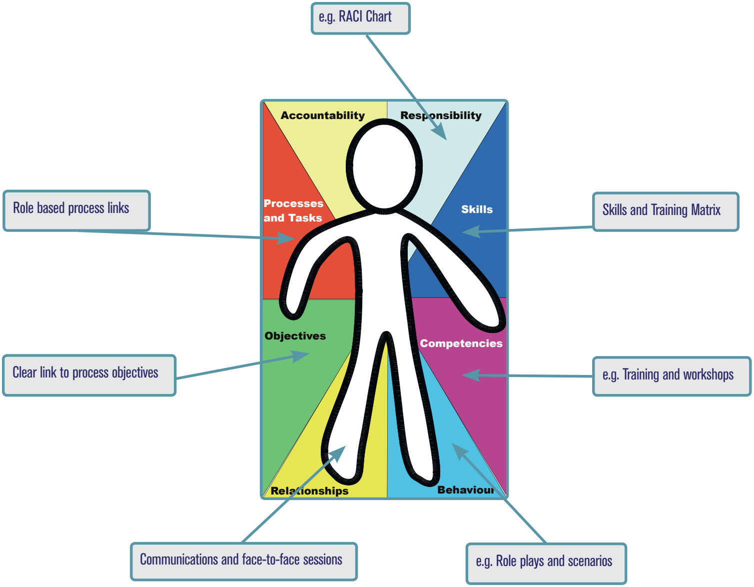
DELIVER BRILLIANT MATERIALS WITH PASSION AND EVALUATE

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.



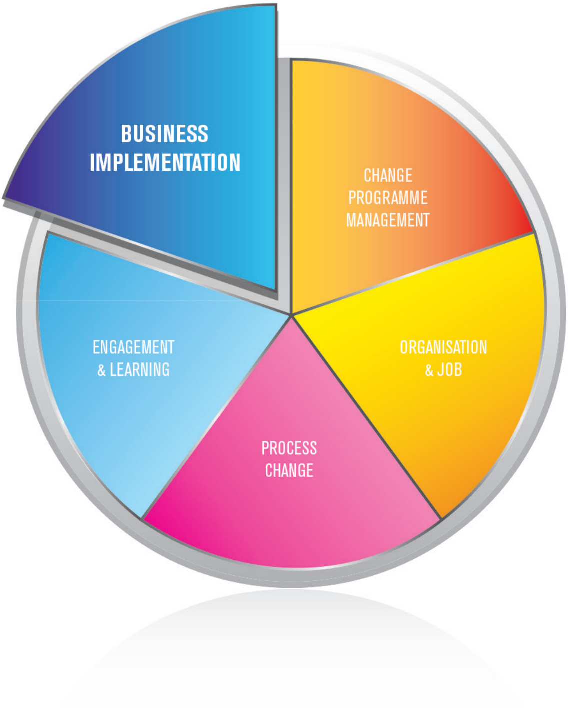
BUSINESS IMPLEMENTATION

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

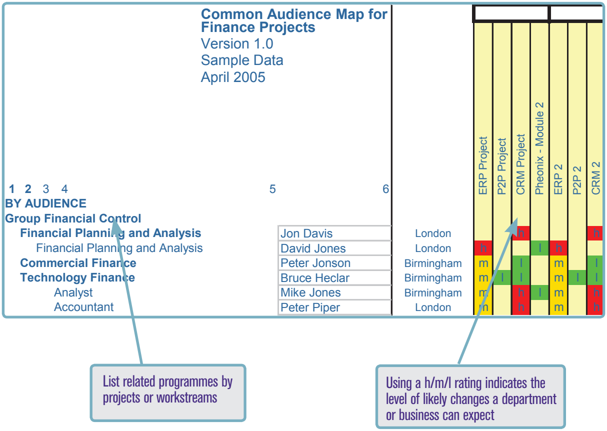
FIND THE PEOPLE WHO NEED TO DO THINGS FOR THE GO-LIVES

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

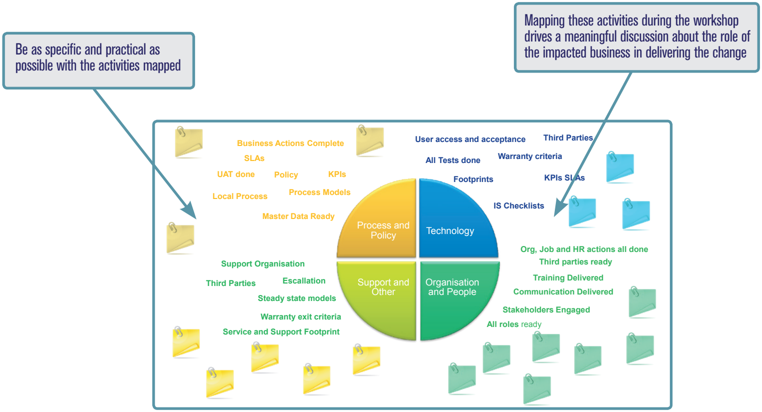
LOOK AT THE PLAN FROM THE BUSINESS POINT OF VIEW

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.



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.

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

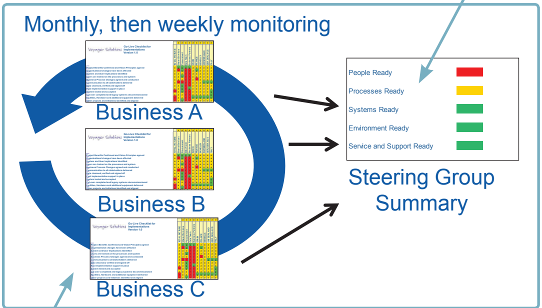
REVIEW. REVIEW. REVIEW. GO-LIVE.

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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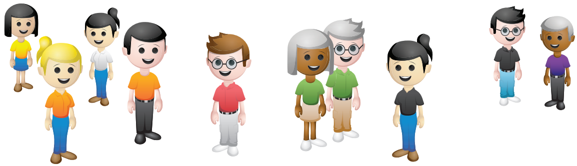

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