

Business Change Toolkit

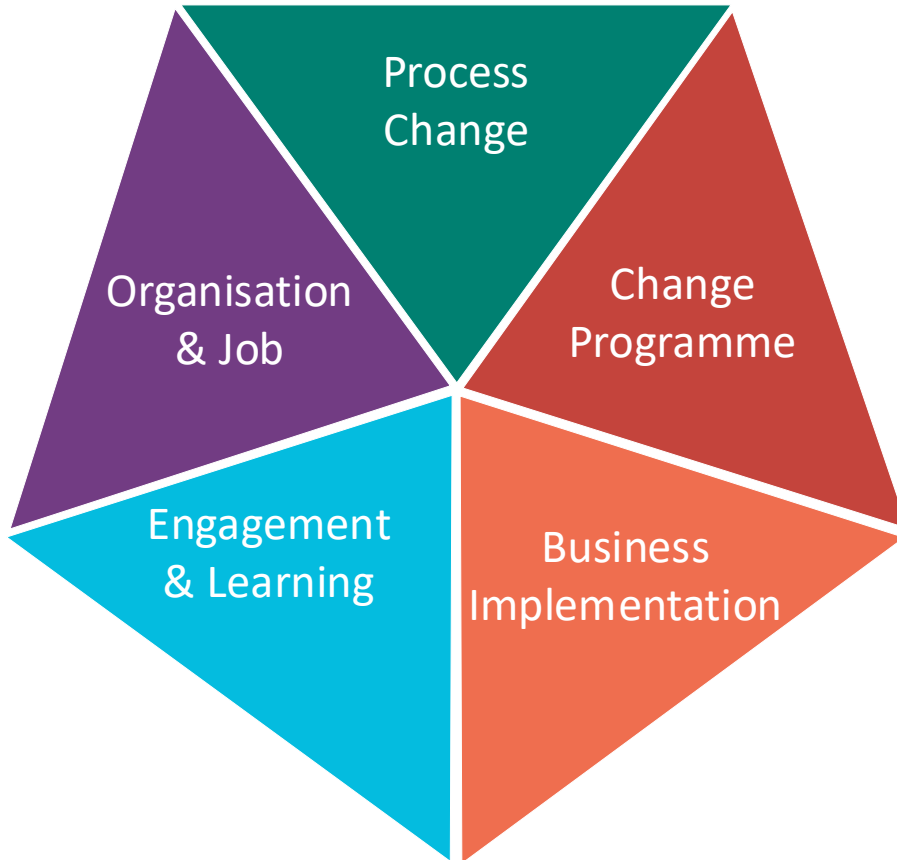
Collaborative Decision Making for a
People Strategy

Babcock Team Approach

Version 1 – Jan 2023



The Famous Five Accelerator Areas



PROCESS CHANGE

- PRO 1 – Set the standards for the process work
- PRO 2 – Create great formats to get people involved
- PRO 3 – Implement the process changes

CHANGE PROGRAMME MANAGEMENT

- CHG 1 Identify impacted processes & people
- CHG 2 Identify change risks & opportunities
- CHG 3 Publish a great change plan

BUSINESS IMPLEMENTATION

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

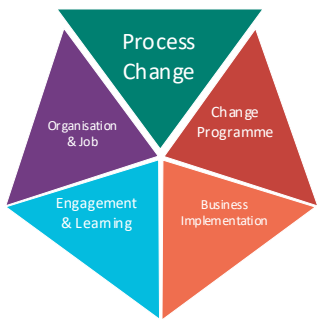
ENGAGEMENT & LEARNING

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

ORGANISATIONAL ALIGNMENT & JOB IMPACT AND ALIGNMENT

- ORG 1 Establish governance for decisions
- ORG 2 Redesign organisation and roles
- ORG 3 Develop profiles layer by layer
- ORG 4 Monitor HR actions for impacted areas
- ORG 5 Launch and monitor handover

- JOB 1 Identify major HR and ORG impacts
- JOB 2 Conduct a job impact analysis
- JOB 3 Plan and monitor business & HR actions
- JOB 4 Engage leaders to deliver actions for key roles
- JOB 5 Make the changes and educate key roles



PRO – Process Change

Introduction to Process Change

PROCESS CHANGE

PRO 1 – Set the standards for the process work

PRO 2 – Create great formats to get people involved

PRO 3 – Implement the process changes

PRO – Process Change

PRO 1 - Set the standards for the process work

Create a charter document that outlines which process formats are needed by which people, and which formats will suit their needs.

Accelerator – Programme Process Charter

The Charter provides a one page view of which processes need to be mapped/presented and which formats shall be used.

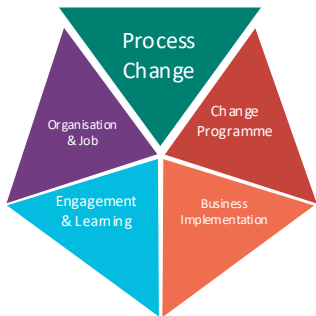
PRO 2 – Create great formats to get people involved

Set up and facilitate a meeting with all project people that need processes to agree what standards will be used across the piece. For end user materials, involve people from the businesses to select relevant and usable designs.

Accelerator – Process Scope Planning Document

This matrix can be used to identify which process formats should be developed for which audiences.

[illegible]



PRO – Process Change

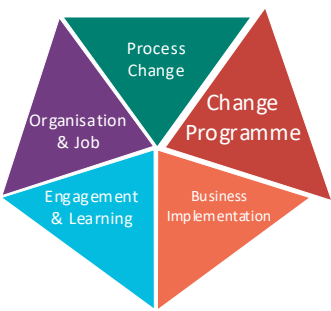
PRO 3 – Implement the Process Change

Construct a four panel flightdeck consisting of the following sections: Team Members – to show any relaunched structures; Customers – to focus on satisfaction levels; Measures – to focus on team PKIs; and Operational Improvements.

Accelerator – The Flightdeck

The Flightdeck provides 'at a glance' visibility of over project team structure and implementation progress, including highlighting any issues and their respective corrective actions.

Section	Accelerator Code	Title of Deliverable	Purpose/usage	Gold Case Study Example	Template Link
Process Change	PRO 1	Programme Process Charter	To outline which process formats are needed by which people, and which format will suit their needs.		/
Process Change	PRO 2	Process Scope Planning Document	To identify which process formats should be developed for which audience.		PRO 2 - Process Scope Planning Document.xlsx
Process Change	PRO 3	Operational Flightdeck	To provide 'at a glance' visibility of overall project progress.		/



CHG – Change Programme Management

Introduction to Change Programme Management

CHANGE PROGRAMME MANAGEMENT

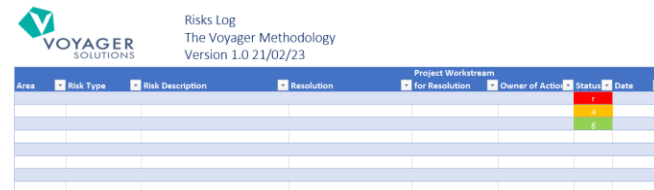
CHG 1 Identify impacted processes & people

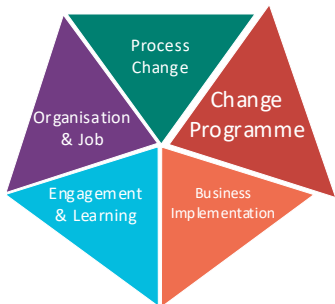
CHG 2 Identify change risks & opportunities

CHG 3 Publish a great change plan



Hold workshops and meetings with people who understand the 'To-be' and with those who understand the 'As-Is' of impacted processes. Build up this matrix to link the two together – what area is impacted by what process and how severe is the impact?





CHG – Change Programme Management

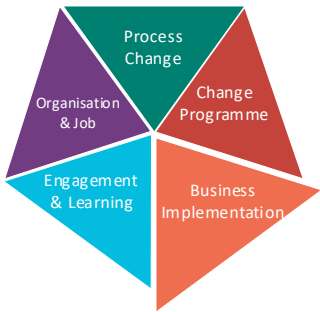
CHG 3 – Publish a change plan

Create a discussion document which outlines: the key change risks and opportunities; the objectives and key outcomes of work; the guiding principles that will drive the work; and the broad change activities.

Accelerators – Change Management Plan

The change plan should be the one-stop shop where project sponsors, project team members, impacted business sponsors, HR and solution providers can get a single, consistent view of what is covered by change management.

Section	Accelerator Code	Title of Deliverable	Purpose/usage	Gold Case Study Example	Template Link
Change Programme Management	CHG 1	Stakeholder to Process Map Template	To list the severity of each process impact against each business area.		CHG 1 - Stakeholder to Process Map Template.xlsx
Change Programme Management	CHG 2	Change Risks & Opportunities Log	To be a comprehensive log of risks and opportunities that arise throughout a project.		CHG 2 - Risks and Opportunities Log.xlsx
Change Programme Management	CHG 3	Change Management Plan	To outline the key change risks and opportunities, the objectives and key outcomes of the work, the guiding principles that will drive the work, and the broad change activities.		/



IMP – Business Implementation

Introduction to Business Implementation

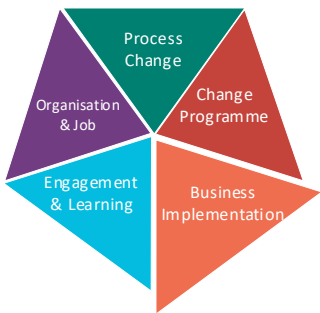
BUSINESS IMPLEMENTATION

IMP 1 Establish governance

IMP 2 Conduct implementation workshops

IMP 3 Develop business readiness checklists

IMP 4 Monitor business actions



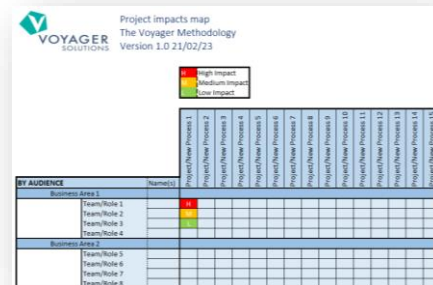
IMP – Business Implementation

IMP 1 – Establish Governance

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 type of activities they will need to local business contacts to do for them to prepare for the go-live.

Accelerator – Projects impacts map

This map will show how a project will impact the businesses. The high/medium/low scale easily shows where the highest impacts are.

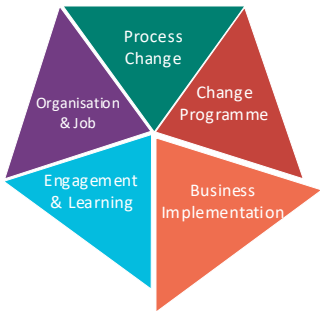


IMP 2 – Conduct implementation workshops

Facilitate workshops between the project team and representatives from the impacted businesses. Ask the project members to present each activity and to explain what they require the impacted businesses to do locally to prepare for the changes. Throughout the workshop, encourage the impacted businesses to articulate what they will need to do to meet these requirements and note these down.

Accelerator – 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.



IMP – Business Implementation

IMP 3 – Develop the business readiness checklist

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.

Accelerator – Business readiness checklist

The checklist should contain yes/no criteria. 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.

VOYAGER SOLUTIONS

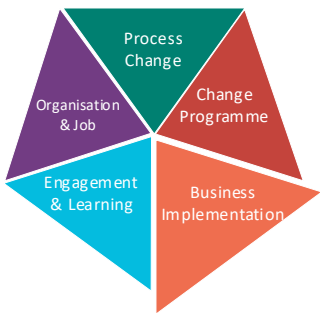
Business Readiness Checklist
The Voyager Methodology
Version 1.0 01/03/23

Status:
G = Completed
A = On Track
R = Risk

	Total Picture	Business Area 1	Business Area 2	Business Area 3	Business Area 4	Business Area 5	Business Area 6	Business Area 7	Business Area 8	Business Area 9	Business Area 10	Business Area 11	Business Area 12
Implementation Task 1	A	A	A	A	A	A	A	A	A	A	A	A	A
Implementation Task 2	A	A	A	A	A	A	A	A	A	A	A	A	A
Implementation Task 3	A	A	A	A	A	A	A	A	A	A	A	A	A
Implementation Task 4	A	A	A	A	A	A	A	A	A	A	A	A	A
Implementation Task 5	A	A	A	A	A	A	A	A	A	A	A	A	A
Implementation Task 6	A	A	A	A	A	A	A	A	A	A	A	A	A

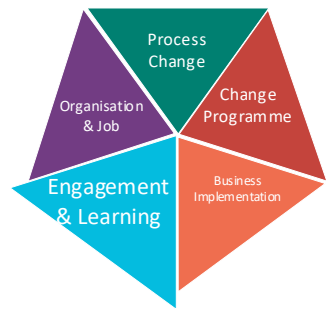
IMP 4 – Monitor business actions

Accelerator – Implementation actions cycle



IMP – Business Implementation

Section	Accelerator Code	Title of Deliverable	Purpose/usage	Gold Case Study Example	Template Link
Business Implementation	IMP 1	Projects Impacts Map	This maps impacts of individual process changes against areas, using a Low, Medium and High severity scale.		IMP 1 - Projects Impacts Map.xlsx
Business Implementation	IMP 2	Implementation Workshop Poster	Posters can be used to engage the businesses to define local actions that are required for the implementation of a process.		/
Business Implementation	IMP 3	Business Readiness Checklist	This checklist should contain yes/no criteria, using a green, amber and red status system		IMP 3 - Business Readiness Checklist.xlsx
Business Implementation	IMP 4	Implementation Actions Cycle			/



ENG – Engagement & Learning

Introduction to Engagement & Learning

ENGAGEMENT & LEARNING

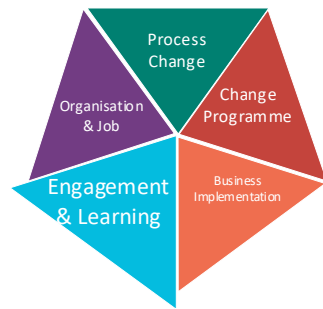
ENG 1 Assess audience needs

ENG 2 Define strategy and approach

ENG 3 Define catalogue, standards
and environment

ENG 4 Prepare logistics and develop

ENG 5 Deliver, evaluate and improve



ENG – Engagement & Learning

ENG 1 – Assess audience needs

Create a breakdown of the impacted stakeholders to understand audiences.

Accelerator – Audience and channel analysis

A good audience analysis will contain: logical groupings of audiences; very outcome focussed messages; and characteristics that will allow you to select the best methods of delivery.

VOYAGER SOLUTIONS Audience and Channel Analysis
The Voyager Methodology
Version 1.0 21/02/23

Stakeholder Group	No. of People	Business Area	Complexity	Language	Usage	Frequency	Typical Channels
SALES							
Order Administration	25	Germany, Packaging	Medium	German	85%	Daily	Notice board
Order Administration	80	Germany, Packaging	Medium	German	85%	Daily	Newscaster
Order Administration	40	France, Packaging	Medium	French	85%	Daily	Daily brief
FINANCE							
Cost Centre Managers	1000	UK	Low	English	0.05%	Monthly	Notice board
AP Accountant	20	UK	Medium	English	95%	Daily	Newscaster
General Ledger Managers	5	UK	High	English	95%	Daily	Daily brief

ENG 2 – Confirm strategy and approach

Using the audience groupings and a time-line, confirm the messages or engagement activities that will need to be communicated at points along the time-line.

Accelerator – Engagement and learning plan

The plan should contain the single snapshot of all engagement and learning events planned.

VOYAGER SOLUTIONS Learning and Engagement Plan
The Voyager Methodology
Version 1.0 02/03/23

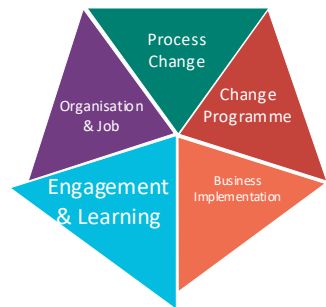
Business Area	Message/Event	Format	Frequency/Timing	Developed by	Delivered by	Timeline
Business Area 1						
Communications	Topic 1	Regularly Asked Questions	Powerpoint	September	Project Manager	Project Manager
	Topic 2					
	Topic 3					
	Topic 4					
	Topic 5					
	Topic 6					
	Topic 7					
Business Area 2						
Subgrouping 1	Topic 8					
	Topic 9					
	Topic 10					
	Topic 11					
	Topic 12					
	Topic 13					
	Topic 14					



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

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.

[illegible]



ENG – Engagement & Learning

ENG 5 – Deliver, evaluate and improve

Deliver the messages or events with passion. Evaluate the success by assessing the use of traditional measures such as quality of the room, instructors and materials. Importantly assess whether the individuals are 'job ready' – can they go back to work and perform the key tasks that are expected of them?

Accelerator – Role-Based Materials

Numerous materials to track actions etc at a role level, e.g.; RACI Chart; Skills and Training Matrix; Training and workshops.

Section	Accelerator Code	Title of Deliverable	Purpose/usage	Gold Case Study Example	Template Link
Engagement and Learning	ENG 1	Audience and Channel Analysis	A matrix that lists audiences that require learning/engagement and the complexity of said learning/engagement, to act as a jumping off point for scheduling events.	GLD ENG 1 - RRENG PPD1 Training Needs Analysis 16.12.16 Signed off FINAL (003).xlsx	ENG 1 - Audience and Channel Analysis.xlsx
Engagement and Learning	ENG 2	Engagement and Learning Plan	A matrix that lists all upcoming learning events, their dates and the status of their preparation.	GLD ENG 2 - NMNA Training Strategy 2017 v20.pptx	ENG 2 - Engagement and Learning Plan.xlsx
Engagement and Learning	ENG 3	Catalogue of Brilliant Formats	A catalogue to 'sell' events and courses to stakeholders who are recipients, and to people who will need to be involved in creating the content.	GLD ENG 3 - Training Standards and Planning	/
Engagement and Learning	ENG 4	The Development Plan and Course Mappings	A matrix that tracks the projects of individual learning workshops.	GLD ENG 4 - Training Delivery Plan and Final Timetable	ENG 4 - Development Plan and Course Mappings.xlsx
Engagement and Learning	ENG 5	Role-Based Materials	Numerous materials to track the project at a role level.		FOLDER TO DO



ORG & JOB – Organisational Alignment & Job Impact and Alignment

Introduction to Organisation & Job

ORGANISATIONAL ALIGNMENT & JOB IMPACT AND ALIGNMENT

ORG 1 Establish governance for decisions
ORG 2 Redesign organisation and roles
ORG 3 Develop profiles layer by layer
ORG 4 Monitor HR actions for impacted areas
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[illegible][illegible]



ORG 4






ORG & JOB – Organisational Alignment & Job Impact and Alignment

ORG 5

VOYAGER SOLUTIONS ORG 5 - Knowledge Transfer Tracker
The Voyager Methodology
Version 1.0 21/02/23

		Process	Process	Process	Process	Process	Process	Process	Process	Process
Business Area	Team									
	Role									
	Role									
	Role									
	Role									
	Team									
	Role									
	Role									
	Role									
	Role									

JOB 1



The HR Activity Tracker

The Voyager Methodology

Version 1.0 01/03/23

		Position Status and Next Steps						
		STATUS FILLED - position filled INTERNAL - internal recruitment process in progress EXTERNAL - external recruitment process in progress WIP - required but not in place yet ACTION - further actions required						
		NAME	STATUS	Internal/external	Action	Next Step Date	Decision Maker	Decision Date
ISC Manager	ISC Manager	NAME	EXTERNAL					
	Cash and Bank Accountant	NAME	EXTERNAL					
	Cash Associate	Job Role						
	Cash Associate							
	Cash Associate							
	Cash Associate							
	Cash Associate							



ORG & JOB – Organisational Alignment & Job Impact and Alignment

JOB 2

VOYAGER SOLUTIONS Detailed Business Assessment

Tasks and Procedures

☐ 1. What tasks will the department no longer perform?

☐ 2. What new tasks will be required?

☐ 3. What tasks will be different (eg. Automation, changes to systems)?

☐ 4. Will any deadlines change?

Responsibilities

☐ 1. Will the role be accountable for any tasks which they were not previously?

☐ 2. Will the role lose accountability for any tasks which they previously had?

☐ 3. Are there any decisions which need to be made about ownership of data?

Relationships

☐ 1. What new relationships will be required after the implementation?

☐ 2. What relationships will change as a result of the implementation?

☐ 3. What relationships will be lost as a result of the implementation?

Skills and Competencies

☐ 1. What new competencies / skills will be required when competing the new processes?

☐ 2. Are there behavioural / interpersonal skills required in the new way of operating?

☐ 3. Are there any changes to the mainframe system skills required?

☐ 4. Are there any changes to use of reporting or interface systems?

Objectives and Measures

☐ 1. Which of our current measures will become unnecessary as a result of the implementation?

☐ 2. What new objectives and measures are required to be in place after Go-live?

☐ 3. Do departmental objectives change?

☐ 4. Do individual objectives change?

Volumes

☐ 1. Do the processes involve a different number of screens for a particular role?

☐ 2. Do the processes involve owning data which previously they did not own?

☐ 3. Do the processes involve losing ownership of any data?

Behaviours

☐ 1. What new behaviours are required to be displayed when performing the new roles?

☐ 2. Are there any critical behaviours required in the new world?

☐ 3. What behaviours are no longer required to be displayed in order to perform the processes?

JOB 3

VOYAGER SOLUTIONS The Business Action Plan
The Voyager Methodology
Version 1.0 01/03/23

	Person Responsible	Week 1	Week 2	Week 3	Week 4	Week 5	Week 6
HR / Change Activities							
Organisational Level							
Workshops to discuss Vendor Master							
AP Role Changes							
Discuss Task Changes with SAP Project							
Discuss Task Changes with Team							
Evaluate Post Clerk responsibilities							
Discuss objectives with individual							
Business Skills Training							
Select Improvement Course							
Attend improvement Course							



ORG & JOB – Organisational Alignment & Job Impact and Alignment

JOB 4

JOB 5

Prepared by

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