

# **ORGANIZATIONAL CHANGE MANAGEMENT & INSTRUCTIONAL DESIGN PORTFOLIO**

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*Technology Adoption | Change Communications | Training Development | User Enablement*

## Executive Summary

Instructional design and technology professional with 15+ years of experience driving user adoption through strategic communications, training development, and change management. Entrepreneur and co-founder with proven ability to build complete learning ecosystems from the ground up:

- Designed interactive healthcare operations dashboard enabling real-time decision-making
- Developed workforce curriculum that secured \$200K in state grant funding
- Built software solution achieving 90% process automation and 50% time reduction
- Created state-approved vocational curriculum and launched accredited trade school
- Led cross-functional collaboration between IT, business, and end-users across all ventures

## Core Competencies

Change Management	Content Development
<ul style="list-style-type: none"><li>• Stakeholder Analysis</li><li>• Impact Assessment</li><li>• Adoption Metrics</li><li>• User Feedback Loops</li></ul>	<ul style="list-style-type: none"><li>• Curriculum Design</li><li>• Interactive Dashboards</li><li>• Training Programs</li><li>• Process Documentation</li></ul>

## Case Studies

### Case Study 1: Healthcare Operations Dashboard

**Role:** UX Designer / Developer (Consulting Project)

**Timeline:** December 2024

**Live Demo:** [Interactive prototype available upon request]

#### Challenge

A multi-hospital health system needed real-time visibility into surgery room utilization to maximize revenue. Surgeons were booking operating rooms in advance (blocks) and releasing them last-minute, causing significant revenue loss. The existing quarterly reporting cycle made it impossible to identify patterns or hold surgeons accountable for underutilization.

#### Approach

- **Requirements Gathering:** Collaborated with engineering team to understand data architecture, stakeholder pain points, and decision-making workflows
- **User-Centered Design:** Designed intuitive drill-down navigation from regional overview to individual surgeon metrics
- **Performance Framework:** Created weighted scoring system with configurable metrics for fair, transparent evaluation
- **Change Management:** Built dispute resolution workflow to maintain surgeon relationships during accountability rollout

#### Solution Features

- **Hierarchical Navigation:** Region > Hospital > Unit > Room > Surgeon drilldown
- **Tier Rankings:** Platinum/Gold/Silver/Bronze classification based on weighted performance metrics
- **Calendar Views:** Weekly and monthly block scheduling with utilization heat maps
- **Role-Based Access:** Super User, Administrator, Director, Scheduler, and Physician permission levels
- **Dispute Tracking:** Complete workflow for flagging, contesting, and resolving utilization discrepancies
- **Configurable Metrics:** Adjustable weights for utilization, volume, turnaround time, late releases, cancellation rates

#### Results

- **Real-time visibility** replacing quarterly reporting cycles
- Interactive prototype enabling stakeholder feedback before full development investment
- Fair evaluation system with dispute resolution to protect surgeon relationships

#### Deliverables Created

- Fully functional React application (1,795 lines of production-ready code)
- Responsive design for desktop and tablet administration
- Mock data architecture ready for API integration
- Complete UX flow documentation

## Case Study 2: Workforce Development Program

**Organization:** Xactware (Training Manager)

**Timeline:** September 2014 - July 2015

### Challenge

Xactware identified a critical gap in local tech talent availability. The company needed to develop a workforce training initiative that would address this gap while securing state funding through the Utah Cluster Acceleration Partnership (UCAP) program - a competitive grant requiring demonstrated ROI and educational partnerships.

### Approach

- **Stakeholder Analysis:** Mapped decision-makers across state government, educational institutions, and industry partners
- **Curriculum Development:** Created proprietary web development curriculum aligned with industry standards and employer needs
- **Partnership Building:** Negotiated agreements with MTECH and local educational institutions for program delivery
- **Grant Advocacy:** Developed and delivered RFG presentation to governors committee demonstrating program value and projected outcomes

### Results

- **Secured \$200,000 UCAP grant** for program development and implementation
- Successfully launched MTECH Web Development program
- Established sustainable partnership model for ongoing workforce development

### Deliverables Created

- Complete web development curriculum with learning objectives, modules, and assessments
- Grant proposal documentation with ROI projections and success metrics
- Educational partnership agreements and program guidelines
- Stakeholder presentation materials for state-level review

## Case Study 3: Healthcare Process Automation

**Organization:** Resolute Services (IT Consultant / Project Manager / Co-founder)

**Timeline:** May 2008 - December 2012

### Challenge

A Medicaid-based mental health agency was struggling with inefficient manual processes for medical billing and payroll. Staff spent excessive time on paperwork, errors were common, and the agency faced compliance risks. The leadership needed a technology solution but lacked internal IT expertise to define requirements or manage implementation.

### Approach

- **Business Process Analysis:** Documented existing workflows across all departments to identify inefficiencies and automation opportunities
- **Journey Mapping:** Created visual before/after representations of user workflows to communicate changes and build buy-in
- **Solution Design:** Led development of custom software solution integrating billing, payroll, and compliance tracking
- **Change Management:** Developed training materials and provided hands-on support during rollout to ensure staff adoption

### Results

- **50% reduction in processing time** for medical billing and payroll operations
- **90% automation** of critical business processes previously done manually
- Improved staff satisfaction and significantly reduced manual errors
- Enhanced compliance tracking and audit readiness

### Deliverables Created

- Custom software solution for healthcare operations management
- Process documentation and workflow diagrams
- User training materials and quick-reference guides
- Before/after journey maps demonstrating efficiency gains
- Standard operating procedures (SOPs) for all automated processes

## Case Study 4: Vocational Training Program Launch

**Organization:** Arizona Esthetics Institute (Instructional Design Consultant / Co-founder)

**Timeline:** May 2003 - December 2004

### Challenge

Arizona lacked accessible vocational training options in esthetics for at-risk youth. Existing programs were expensive, had limited capacity, and did not serve underserved populations. There was an opportunity to create a state-approved program that would provide career pathways while partnering with school districts to reach students who might not pursue traditional higher education.

### Approach

- **Regulatory Research:** Navigated Arizona State Board requirements to understand curriculum standards and approval process
- **Curriculum Design:** Developed comprehensive esthetics curriculum meeting state licensing requirements and industry standards
- **Partnership Development:** Secured agreements with local school districts to provide pathway for at-risk youth
- **Facility Build-out:** Managed complete build-out of training facility including equipment, supplies, and regulatory compliance

### Results

- **State-approved curriculum** meeting Arizona Board of Cosmetology requirements
- Successfully launched accredited trade school program
- Established school district partnerships providing career pathways for at-risk youth
- Enrolled initial student cohorts and achieved licensing exam pass rates

### Deliverables Created

- Complete state-approved esthetics curriculum with lesson plans and assessments
- Instructional materials including student handbooks and practical guides
- Assessment frameworks aligned to state licensing exam requirements
- School district partnership agreements and recruitment materials
- Facility operations manual and compliance documentation

## Sample Deliverables

The following pages contain sample deliverables demonstrating my approach to change management communications, instructional content, and user enablement materials.

## Sample 1: Quick-Start Guide

**Context:** This sample demonstrates my approach to creating user-friendly quick-start guides for technology adoption. The format prioritizes scannability, clear action steps, and visual hierarchy.

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### QUICK-START GUIDE

#### Microsoft Teams: Getting Started in 5 Minutes

##### What You Will Learn

By the end of this guide, you will be able to join meetings, send messages, and share files in Microsoft Teams.

##### Before You Begin

- Ensure you have your UCF NID and password ready
- Download Teams from the Software Center or use the web version at [teams.microsoft.com](https://teams.microsoft.com)

##### Step 1: Sign In

1. Open Microsoft Teams
2. Enter your UCF email (yourNID@ucf.edu)
3. Complete Duo authentication when prompted

##### Step 2: Join a Meeting

1. Click the meeting link in your calendar invitation
2. Select your audio and video preferences
3. Click Join now to enter the meeting

##### Step 3: Send a Message

1. Click Chat in the left navigation
2. Click New chat and type a colleagues name
3. Type your message and press Enter

**Pro Tip:** Use @mentions to notify specific people in group chats. Type @ followed by their name.

##### Need Help?

- **ServiceNow:** Submit a ticket at [servicenow.ucf.edu](https://servicenow.ucf.edu)
  - **IT Support Center:** 407-823-5117
  - **Office Hours:** Drop-in help available Tuesdays 2-4pm, Tech Commons
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## Sample 2: Change Communication Email

**Context:** This sample demonstrates my approach to change communications following OCM best practices. The email uses the ADKAR framework elements: Awareness (why), Desire (benefits), Knowledge (what to do), Ability (how to prepare), and Reinforcement (support resources).

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**Subject:** Action Required: New Expense Reporting System Launches March 15

Dear UCF Faculty and Staff,

### What is Changing

Beginning March 15, UCF will transition from the legacy expense system to Workday Expenses. This upgrade is part of our ongoing commitment to streamline administrative processes and improve your experience.

### Why This Matters to You

- **Faster reimbursements:** Average processing time reduced from 14 days to 5 days
- **Mobile access:** Submit expenses and upload receipts from your phone
- **Simplified approvals:** Single-click approval for managers
- **Real-time tracking:** See exactly where your expense report is in the approval process

### What You Need to Do

1. **Complete required training** (15 minutes) by March 10: [Training Link]
2. **Submit any pending expenses** in the current system by March 12
3. **Download the Workday app** to your mobile device (optional but recommended)

### Resources and Support

- **Quick-Start Guide:** [Link to guide]
- **Video Tutorial:** [Link to 3-minute overview video]
- **FAQ:** [Link to knowledge base]
- **Live Office Hours:** March 13-14, 10am-2pm, Tech Commons (drop-in help)

Questions? Reply to this email or submit a ticket through ServiceNow.

Thank you for your partnership in making this transition smooth.

UCF IT Change Management Team

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## Sample 3: Knowledge Base Article

**Context:** This sample demonstrates my approach to knowledge base content. Articles are structured for findability (clear titles, metadata), scannability (headers, bullets), and actionability (step-by-step instructions).

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KB0012345 | Category: Microsoft 365 | Last Updated: December 2025

## How to Reset Your Duo Mobile Device

### Overview

This article explains how to reset Duo Mobile if you get a new phone, lose your device, or need to re-register for two-factor authentication.

### Applies To

- Faculty, Staff, and Students
- All UCF-affiliated accounts requiring Duo authentication

### Before You Begin

You will need:

- Your UCF NID and password
- Access to your new mobile device
- Approximately 5-10 minutes

### Instructions

#### Option 1: Self-Service Reset (Recommended)

1. Go to myucf.edu and click Manage Duo Device
2. Sign in with your NID and password
3. Select Add another device
4. Follow the on-screen prompts to register your new phone
5. Test by logging into a UCF application

#### Option 2: Contact IT Support

If you cannot access self-service, contact the IT Support Center:

- **Phone:** 407-823-5117
  - **Email:** itsupport@ucf.edu
  - **Walk-in:** John C. Hitt Library, Room 132
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## Skills and Tools

Change Management	Content Creation	Technical Skills
ADKAR Framework Stakeholder Analysis Impact Assessment Adoption Metrics Training Delivery	Articulate 360 Figma (UX/UI) React Development Curriculum Design Technical Writing	Microsoft 365 ServiceNow Confluence/JIRA HTML/CSS/JavaScript Data Visualization

## Education and Professional Development

### University of Central Florida

Bachelor of Science, Integrative General Studies (December 2025)

Master of Arts, Instructional Design and Technology (Beginning January 2026)

### Georgia Institute of Technology

UX Design Intensive Certificate

### Additional Training

- Western Governors University - IT Business Management
- VSchool - Computer Programming Intensive
- Utah Valley University - Digital Marketing, Entrepreneurship, Business Management

- End of Portfolio -