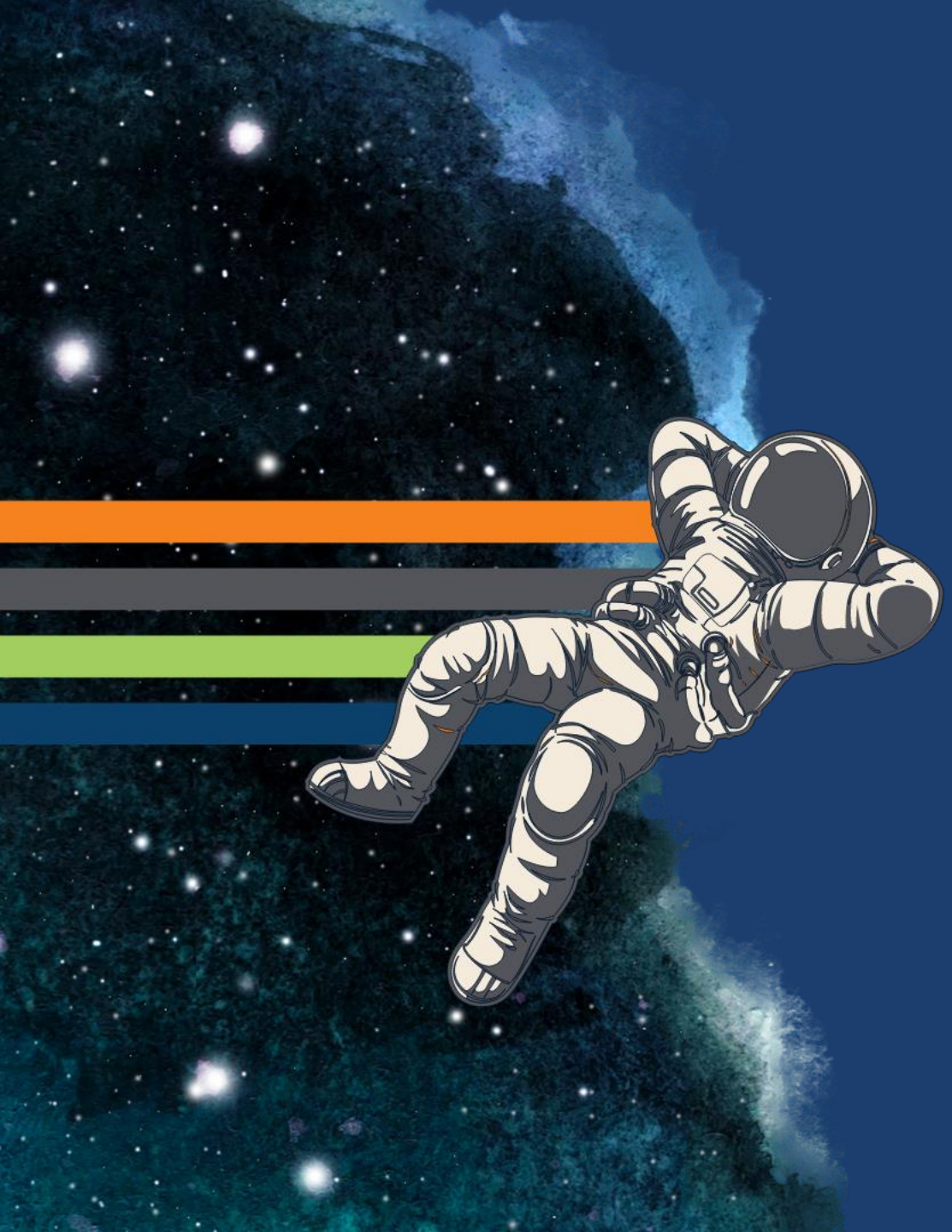
Velosio

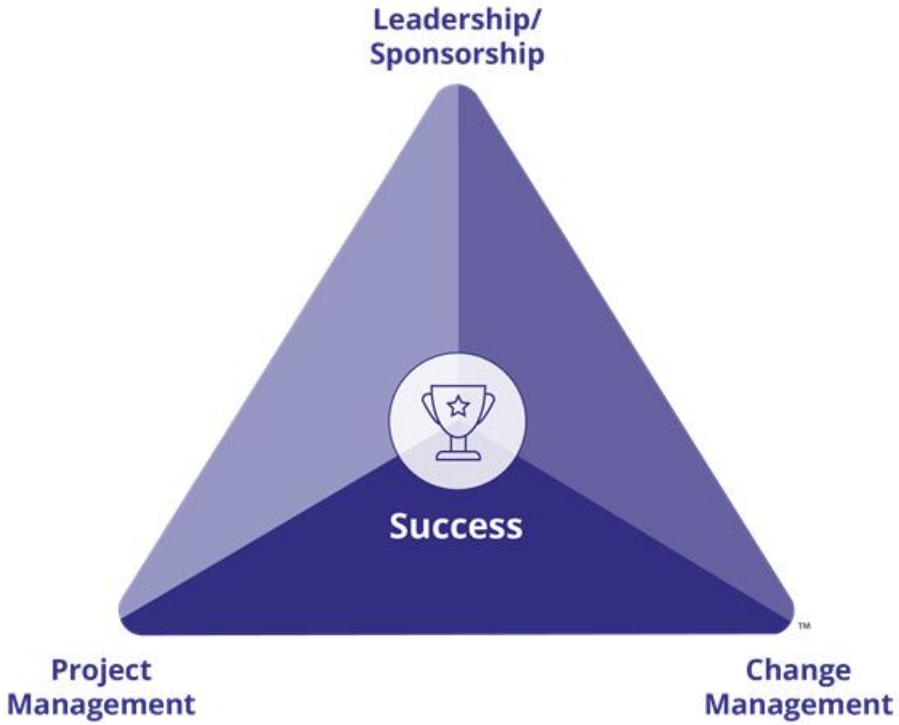


Change is Constant.

What is **Change Management**?

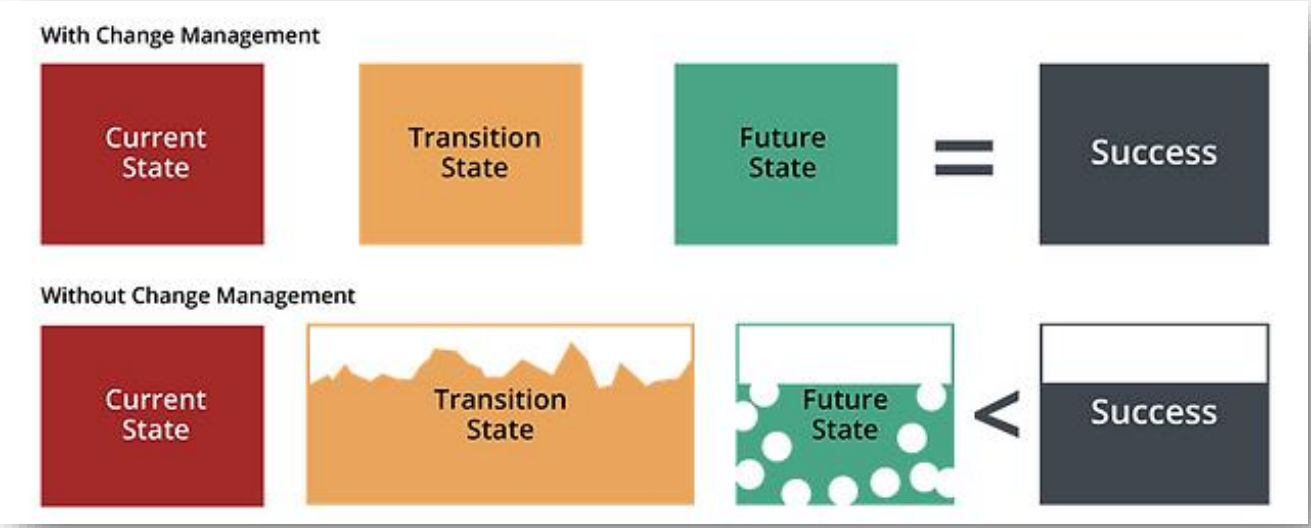
- Change Management looks at the People Side of technical deployments
  - This is the most important component of any business applications deployment --- getting users to leverage the application leads to higher ROI

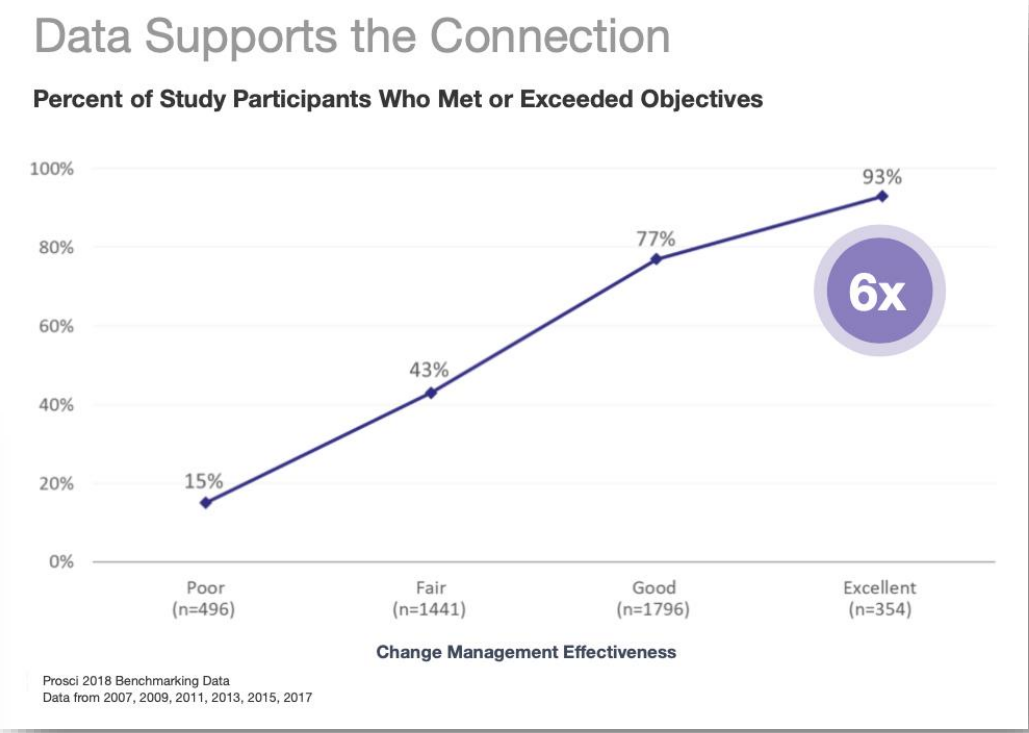
- There are many Change Management methodologies, but very common one is Prosci which has emphasis on guiding individuals through change in order to achieve group change
  - ADKAR and Individual Journey through Change (Awareness Desire, Knowledge, Ability, Reinforcement)
  - Three Pillars to Project Success is dependent on Leadership/Sponsorship, Project Management, and Change Management



What does Change Management do?

- **Higher ROI** (high user adoption ON DAY 1 leads to higher return on project investment)
- **Risk Mitigation** (avoid swing-and-miss with end users)
- **Meet Objectives** (and communicate those objectives upward, sideways, downward)





What happens when there is no **Change Management**?

Themes for Business Application Deployments

UAT Struggles

False Starts & Extended Sign-Off Time

- This isn't ready
- We aren't ready for users to see this
- Why am I here?
- How do I sign off on this?
- I don't know…

Training Resistance

Choppy Logistics

- What does my job look like on Day 1? Day 2?
- My role is changing and all we are discussing is the tech
- This training isn't relevant to me
- I am unprepared for launch

Long Term Usage Challenges

- I keep everything in email or excel
- Onboarding for new resources is very time consuming
- No long term strategy for improvement or reinforcement

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Note: Above shows what you may hear, feel or observe.

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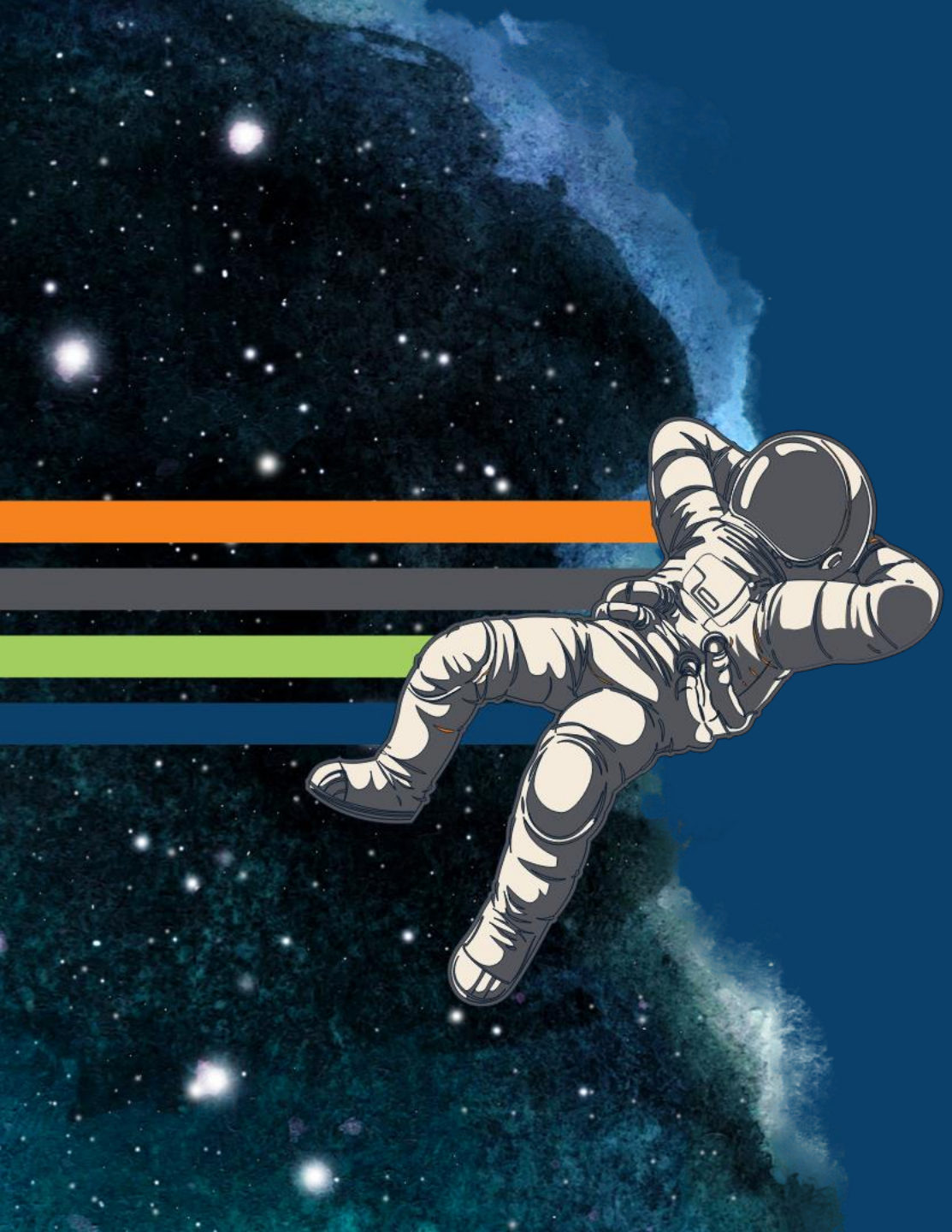

FREE CONSULTATION

Free Consultation

Description: During this 90 minute discussion, we will review the major areas of change management for business applications (CRM, ERP, etc.) which includes the following topics:

- User Resistance concerns and strategies to reduce resistance
- Communication plans
- Training approach

Our Commitment:

- Provide insights into best practices on resistance, communication, and training. Discuss food for thought for current deployment.
- Assist in talk tracks for leadership or stakeholders on the importance of Change Management.

Your Commitment:

- 90 minutes of your time
- No other commitments required

Timeframe:

- A one time 90-minute Teams Video discussion with follow-up notes

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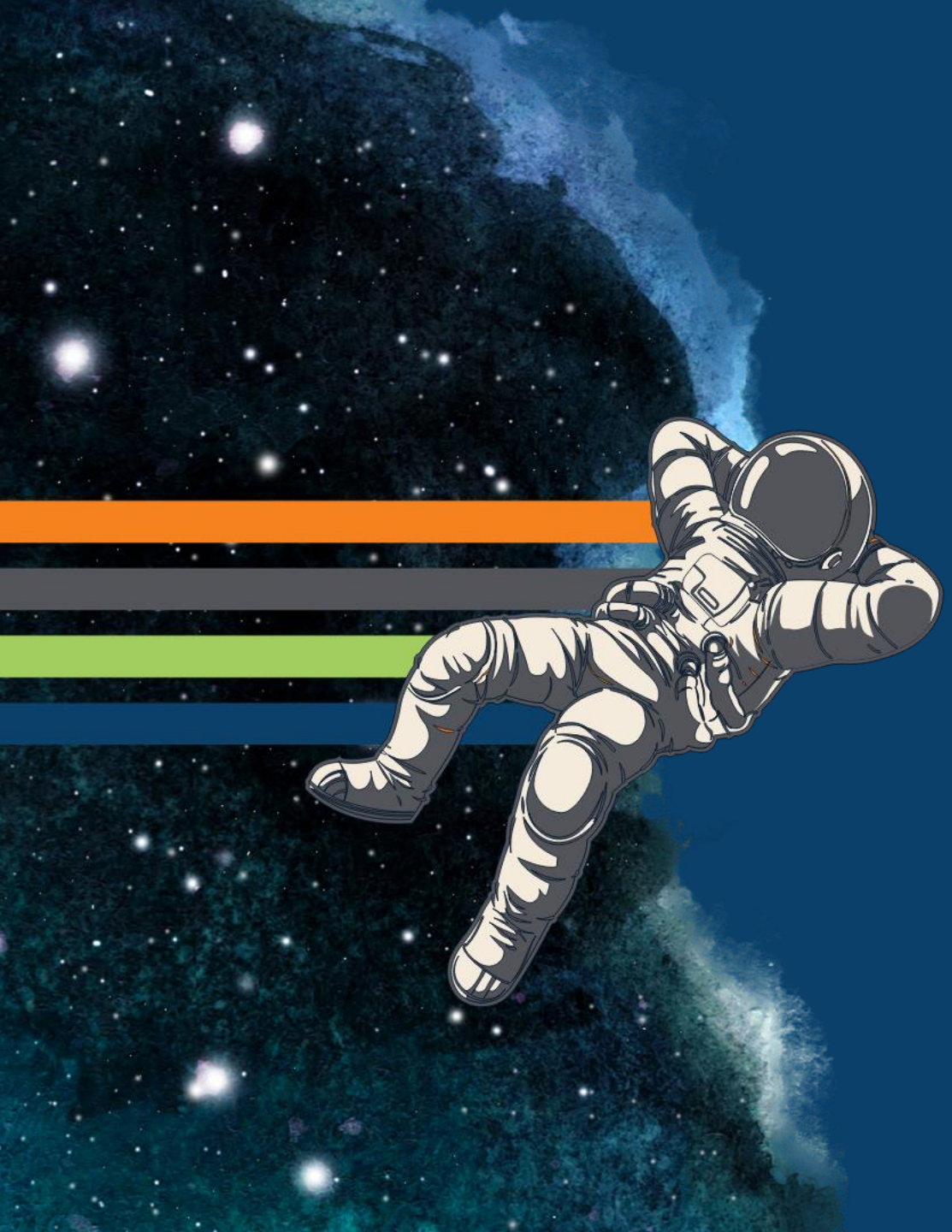
Velosio



PAID ASSESSMENT

OCM Assessment ($12k – Fixed Fee)

Description: Over the course of 2-3 weeks, Velosio will build a Change Management Playbook and Strategy PowerPoint for your business applications deployment.

Our Commitment: We will build your ***Plan for Change***

- Provide insights into best practices on resistance, communication, and training.
- Build detailed Change Management Playbook based on 1:1 interviews and experience with business applications deployments.
- Assist in talk tracks for leadership or stakeholders on the importance of Change Management.
- Deliver PowerPoint deliverable with all findings and recommendations that includes Champions Heat Map, Change Timeline reconciliation, analysis of job change and expectations, Learning Styles consideration

Your Commitment:

- With Velosio's guidance, you will identify 5-6 Champions / Interviewees
  - Individuals that we can have a 20 min 1:1 conversation with to flush out resistance concerns, training needs, and communication desires
- Post 1:1 interviews, you will attend a 60-minute read-out on change management recommendations

Timeframe:

- 2-3 weeks

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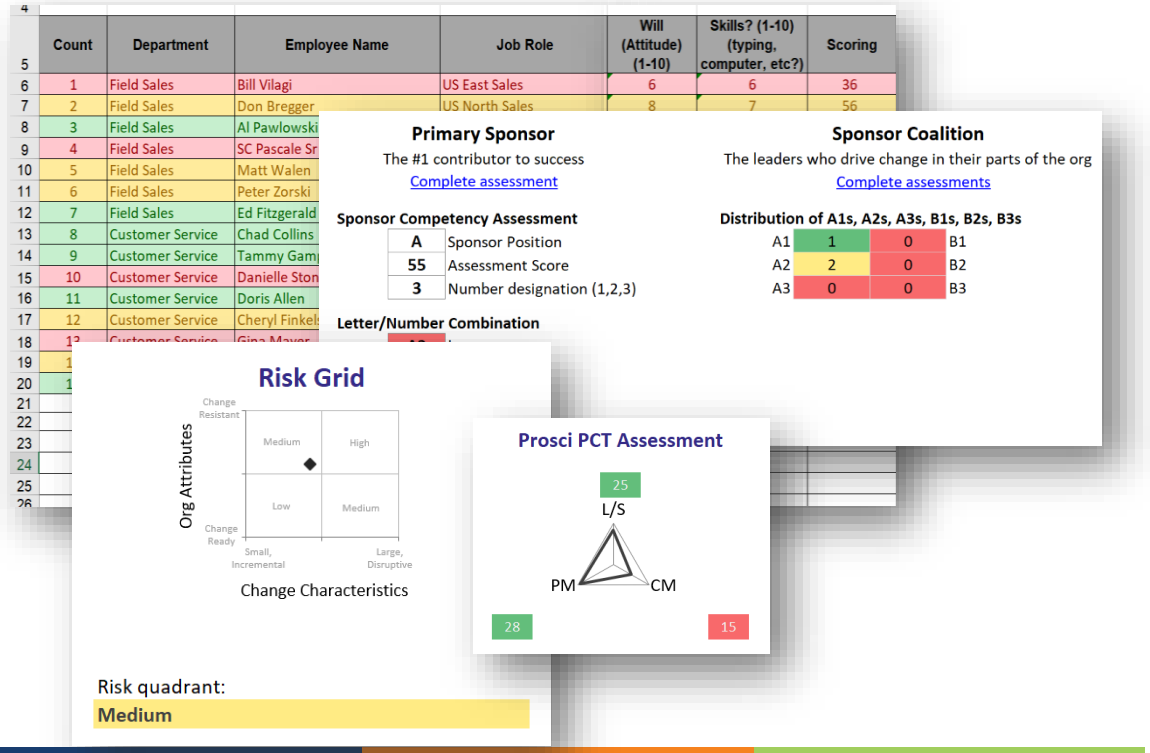
Plan for Change

Approach

We start with a plan that aligns with your implementation that starts with understanding delta between current state and future state:

- Measure Impacted User baseline **Resistance / Change Tolerance** and change risk assessment
- Build communication framework and high-level **communication plan**



Count	Department	Employee Name	Job Role	Will (Attitude) (1-10)	Skills? (1-10) (typing, computer, etc?)	Scoring
1	Field Sales	Bill Vilagi	US East Sales	6	6	36
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Primary Sponsor

The #1 contributor to success

Complete assessment

Sponsor Competency Assessment

A	Sponsor Position
55	Assessment Score
3	Number designation (1,2,3)

Letter/Number Combination

Sponsor Coalition

The leaders who drive change in their parts of the org

Complete assessments

Distribution of A1s, A2s, A3s, B1s, B2s, B3s

A1	1	0	B1
A2	2	0	B2
A3	0	0	B3

Risk Grid

Change Characteristics

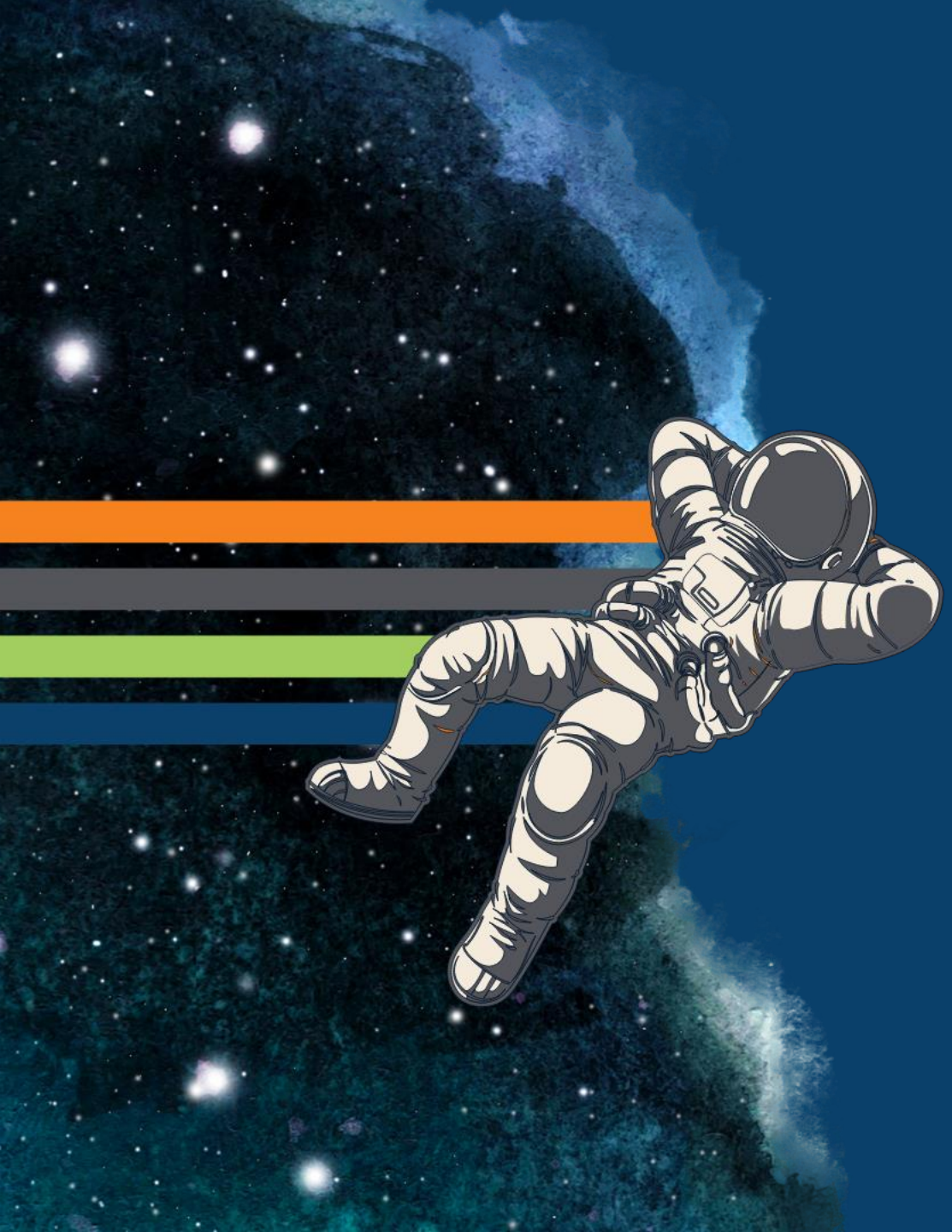
Prosci PCT Assessment

Risk quadrant:

Medium

Date	Days... to GoLive	Sender	Recipient	Key Messages	Message Type	ADKAR
3/30/2023	143	Executive Sponsor	Finance Leadership	Time Commitment for CRP sessions Time Commitment for UAT sessions Time Commitment for Training sessions Mitigation plan for conflicting priorities at month end	Email	Aw
4/2/2023						
4/9/2023						
5/12/2023						
5/27/2023						
6/11/2023						
7/6/2023						
7/8/2023						
7/12/2023						
7/14/2023						

Date	Days... to GoLive	Sender	Recipient	Key Messages	Message Type	ADKAR
7/30/2023	21	Project Sponsor	Finance UAT Users	UAT success and GO decision	Meeting Email output	K
8/1/2023	19	Project Sponsor	Finance Team	Training Preparation and FAQs for attending Training	Intranet Email	K
8/3/2023	17	Finance Leadership	Finance Team	Training Execution & Normal Comms for Training	Email / direct Teams	K
8/13/2023	7	Trainer	Finance Team	Tips and Tricks Training focus areas	FAQ / Poster	Ab
8/15/2023	5	Trainer	Finance Team	Training Feedback Survey	Email	K
8/15/2023	5	Trainer	Finance Team	Mid Training feedback and responses	Email and Meeting	K
8/17/2023	3	Executive Sponsor	Finance Team	Go-Live expectations reminder	Announcement	R
8/19/2023	1	Finance Leadership	Finance Team	Go-Live Announcement Where to get help	Announcement	Ab
8/21/2023	-1	Trainer	Finance Team	Office Hours and Support	Email, FAQs	Ab
8/23/2023	-3	Finance Leadership	Finance Team	Ongoing support	Team Meeting	R
8/25/2023	-5	Trainer	Finance Team	1:1 emails	Email	R
8/27/2023	-7	Project Sponsor	Finance Team	1 week Post Go-Live Survey Identify training gaps Build future comms and training on feedback	Email	R



Velosio

Adding OCM to your ongoing Velosio engagement

What does the **overall flow** look like?

Communication Plan,
Training Schedule & More

Prepare for Change

1

Plan for Change

Paid $12k Fixed Fee
Assessment

2

3

User Enablement

End User Training

Next Slides

See how this offering can be
added to existing projects

Velosio

OCM & Delivery Methodology

Velosio's primary delivery process

PROJECT GOVERNANCE

Scope Management | **Resource Management** | **Solution Oversight** | **Quality Assurance**

Plan

- Project Planning
- Project Charter
- Project Schedule
- Project Kick-Off

Analyze & Design

- Business Process Review
- Requirements Identification
- Fit/Gap Analysis
- Solution Design
- Solution Backlog
- **Plan for Change (Assessments, Communication Design)**

Configure & Develop

- Base Configuration (Fits)
- Data Migration Cycle 1
- CRP 1 for Fits
- Finalize Designs (Gaps)
- Development & ISV Work
- Integrations Design/Dev
- Data Migration Cycle 2
- CRP2 for Gaps
- **Prepare for Change (Focus Groups)**

Transition

- End-to-End Testing
- Train the Trainer (Velosio)
- End User Training
- CRP3 (at client request)
- User Acceptance Testing
- Performance Testing (as needed)
- **Enable Change (Direct end user training sessions)**

Deploy

- System Cutover Activities
- Go live assessment
- Migrate final SDP
- Final Data Migration Cycle
- High level system validation
- **Enable Change (Direct end user training labs)**

Operate

- Go-Live
- Post Go-Live Support (Initial SOW)
- Prepare Support SOW
- Project Close
- Prep for new phases
- Transition to Support Team

TECHNICAL DEPLOYMENT AND ENVIRONMENT MANAGEMENT

Environment Provisioning | Environment Management | Technical Training

STANDARD TEMPLATE LIBRARY

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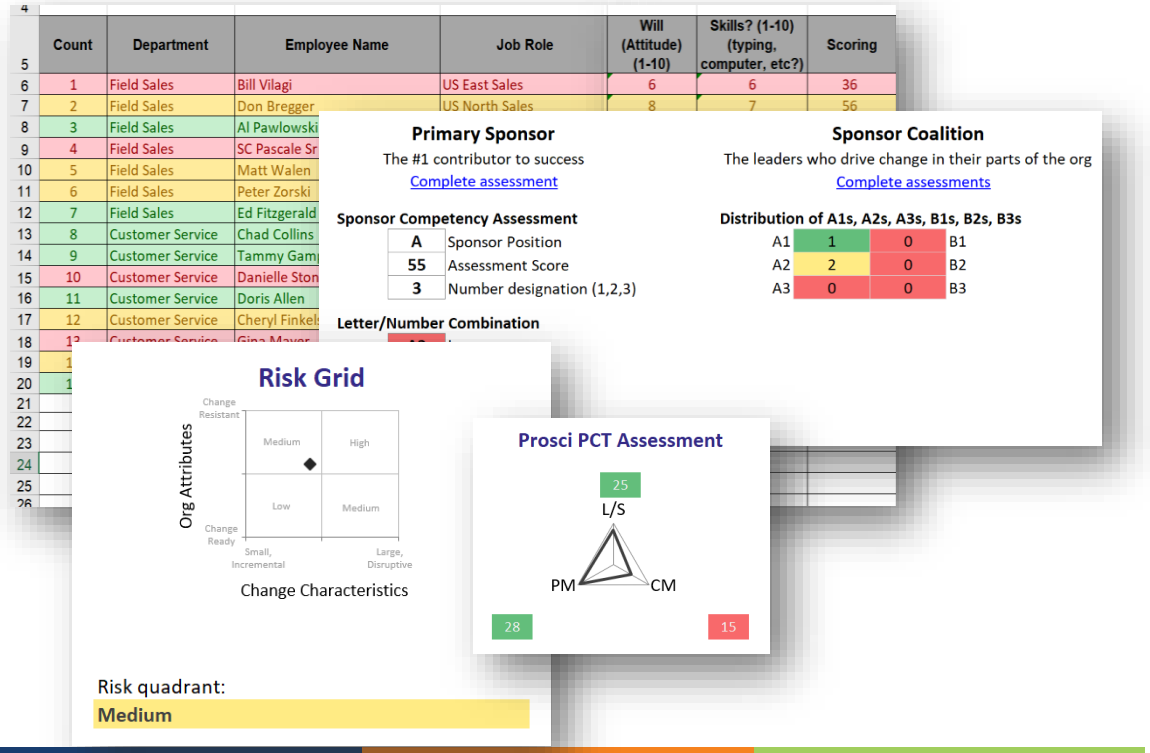

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Prepare for Change

Approach

In the event of high risk and resistance, Velosio recommends Focus Groups and including the users as part of the change.

Establish Impacted User Focus Groups to address and **monitor resistance**

- Communicate upwards focus group feedback
- Communicate downwards key messages in focus groups

When employees contribute to the change, success increases by 24% and improves the odds of the initiative being well-received and sustainable. Giving individuals a voice and actions to support the change gives purpose and space for change.

User Enablement

Approach

Velosio default approach is Train-the-Trainer, which is proven for long term client ownership success.

In addition to Train-the-Trainer, Velosio can host and own direct end-user training.

- Build end-user training collateral
- Develop training plan & training objectives
- Measure success

ID	Training Session	Role	Training Objective	Desired Outcomes	Measures	ADKAR	Attendees	Duration	Location
1.1	Introduction - Session 1	Service Rep	Introduction Exec WIIFM End to End flow	Access confirmation	Access Confirmation	Aw,D	20	1 hr	Lab
1.2	Introduction - Session 2	Service Rep	Introduction Exec WIIFM End to End flow	Access confirmation	Access Confirmation	Aw,D	20	1 hr	Lab
2.1	Accounts Overview	Finance	Deep dive on Accounts Updating an Account Viewing Accounts by attributes	Ability to find an Account Ability to update an Account	Accounts sorted by edited by	K	10	1 hr	Lab
2.2	Accounts Overview	Finance	Deep dive on Accounts Updating an Account Viewing Accounts by attributes	Ability to find an Account Ability to update an Account	Accounts sorted by edited by	K	10	1 hr	Lab

User Role	Count	Training Sessions Tot	Duration per individual
Service Rep	45	6	4 hrs
Finance	10	10	10 hrs

Change Management Activities

Summary of Recommendations & Proposal Activities

Plan for Change

- Measure Impacted User baseline **Resistance / Change Tolerance**
- Build communication framework and high-level **communication plan**

Prepare for Change

- Establish Impacted User Focus Groups to address and **monitor resistance**
  - Communicate upwards focus group feedback
  - Communicate downwards key messages in focus groups
- Refine **Communications** and execute on Communication Plan

User Enablement

- Build Champions network for extended Go-Live support
- **Training Execution** (& in-person Training Summit)
- Pre Go-Live end user Survey
  - Are you ready?
  - Do you feel well trained?
  - What questions are pending?

Reinforcement

- Post Go-Live end user Survey
- Continued execution of communication plan
- Build continuous improvement / feedback loop for future state considerations