Change Management as a Continuum of Discovery
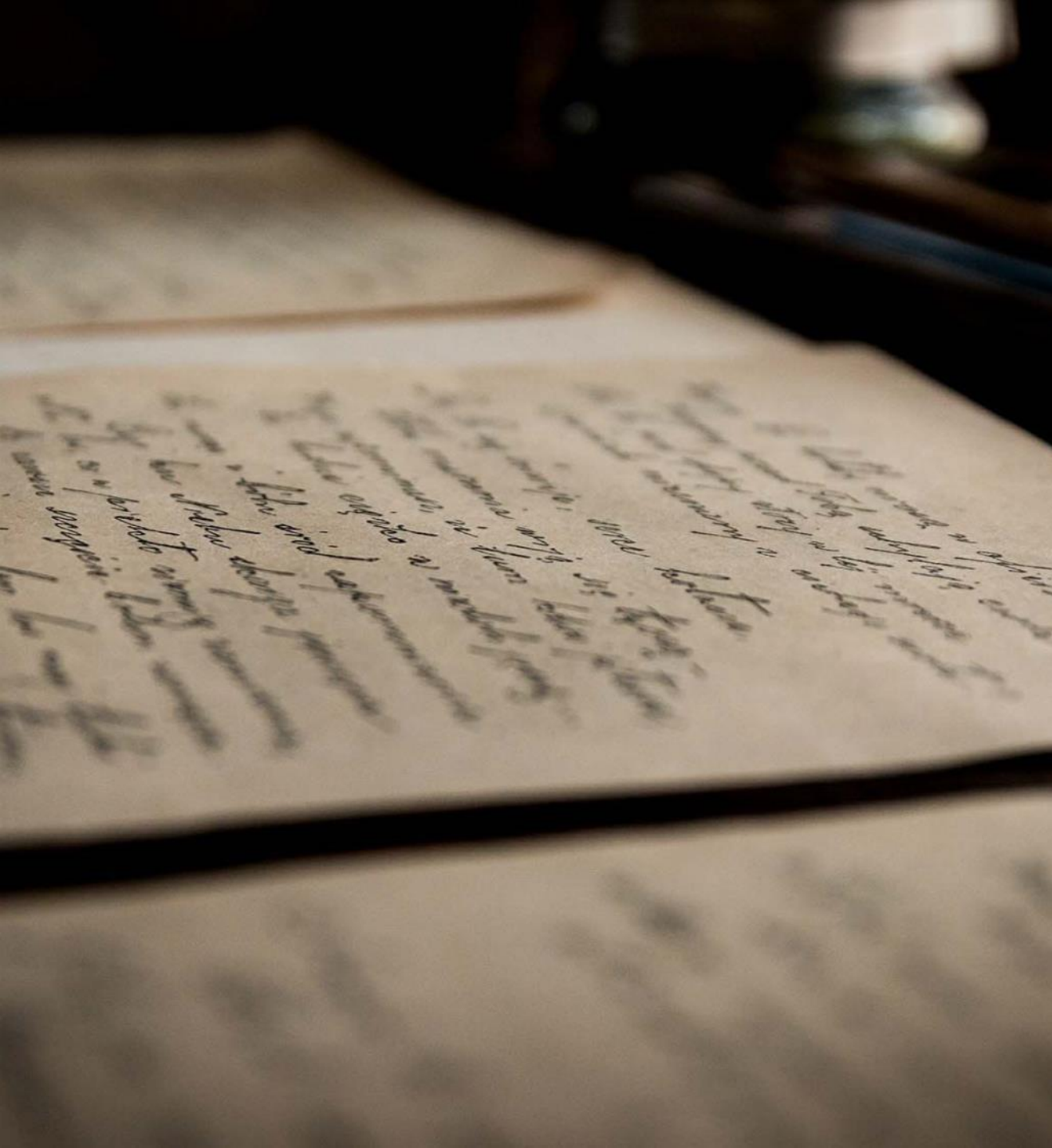
Presented by Beverly Campbell and Don McIntosh

Today we will

Demonstrate the importance of bringing the 'unique' skills/expertise of the OCM into your project to ensure success through:

- A Continuum of Discovery
- Empowered Team(s)

Magna Carta, 2015

Building Relationships Through Discovery

1. The Team shall treat all peoples (team and stakeholders) with respect

2. The Team shall ensure all processes work for all people

3. Communication shall be clear for all people (team/ stakeholders/ organization)

Discovery: Project and Team

Early critique of current state review (organizational and people)

- The OCM must remain neutral; actively listen; ask powerful questions, and use action learning principles... what do <u>you do</u>?

- For example, workflows, task management, degree of standardization

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Discovery: Project and Team

'Meaningful Use' perspective

- Facilitation tools, Appreciative inquiry, Affinity Process to drill into "what has *not* worked"... what are the desirable features?

- Benefits Realization, key areas of functionality, Key Performance Indicators

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Discovery: Project and Team

Stakeholder engagement – this means the client(s) and the project team!

- Sense Making to discover what they <u>don't</u> know and to provide meaning

- Skills to extract information - 'this is what I am hearing'; know when to ask and when to listen

- Stakeholder identification & analysis, engage Leadership, analyze issues and objectives

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The Beginning and Beyond

Building Trust

- Develop a common language around the team members strengths and responsibilities

Will Result in

- The right team member doing the right job

- Admitting mistakes and learning from them

Building Commitment

- Develop a Team Charter, team values and behaviour

- Practice intentional conversations

Will Result in

- Clarity in direction and decision making

- Addresses controversial topics

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Building Accountability

- Clarity of roles while honoring team strengths

- Demand high level of performance

Will Result in

- Standardization of processes

- Team will ensure all team members are successful

- "It's our job"

Building Success

- Focus on results

- Create continuum team development, never stop

Will Result

- Project Success!!

- Project completion 3 months early

The Team shall treat all peoples with respect

- Stakeholder (SH) engagement and change throughout the project – use mapping; be strategic; utilize your SH analysis - address issues: town hall meetings; planned meetings with management and with intent

- Act as a `buffer` between project team and client business issues – facilitate sessions on design/development issues, input and perspective on User Design Review sessions

- Manage client frustration and decision fatigue – determine pressure points; frank and transparent communications; explore reasons: build commitment and clarity in decisions and admit errors in judgement

- Early identification of <u>key</u> stakeholders as early as possible – inclusive, yet respectful

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Project Methodologies - a Change Management perspective

Waterfall

- Sequential staged approach to development
- Priority on early requirements gathering
- Midstream improvements more challenging
- Less SME decision fatigue
- Late errors may be more problematic
- Testing occurs at a late stage
- Requires a clear 'line of sight' to the end product
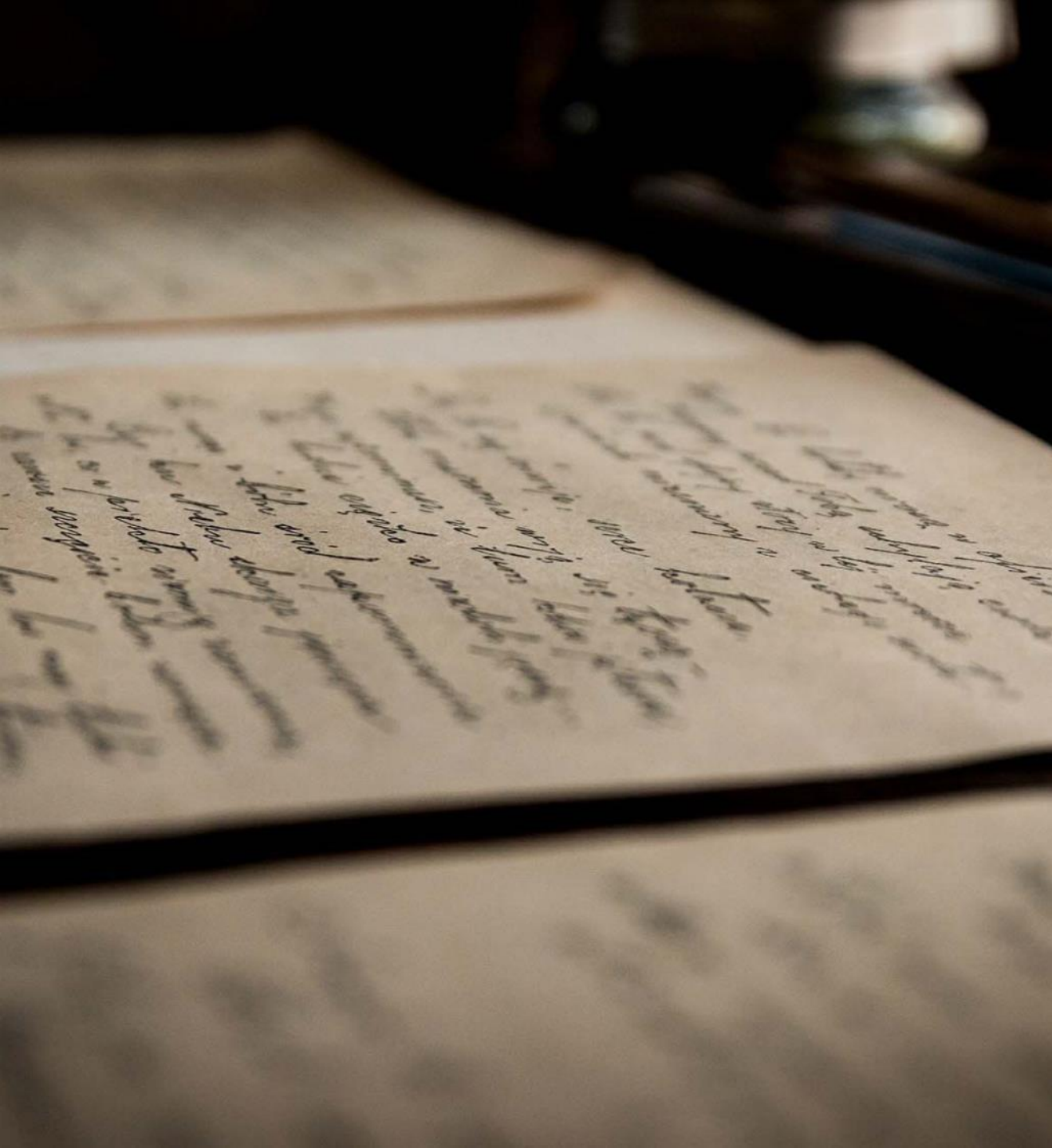- May provide for more transparent cost and timelines

Agile

- Iterative cycles of development and testing
- Allows sequential changes
- Evolving requirements are the norm
- Allows for re-prioritization and continuous improvement
- No 'break' for teams; more fatigue
- Earlier discovery of bugs
- Final product may differ significantly than initially foreseen
- May be seen as working against organizational process or culture
- May offer more collaboration potential

The Team shall ensure all processes work for all people

- Challenge current state assumptions   -   EARLY!

- Benefits Realization – defined KPI's? Status quo?

- Regardless of the project methodology the OCM must help clients:

  - visualize the end product

  - seek clarity on requirements and business priorities

  - identify and analyze decision fatigue

  - bridge cultural 'impasse'

  - facilitate gap analysis to minimize risk of errors

  - to discover key areas of performance and where improvements may be needed

  - to embed qualitative judgement into processes

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Communication shall be clear for all people

- Develop team strength (the greater team) through communication to increase project successes : this means all team members and demands accountability and performance

- OCM must work with PM to ensure right team member is aligned with right business area at the right time: engender a trust building climate within the team

- Parallel engagement with BA team: OCM must become the 'translation bridge' between the BA team and the client to facilitate business process and design clarity – DSOPs, treatment modules, reporting issues, clinic workflows, etc

- a Continuum of Discovery: a requirement for success at all stages, all change issues, all team members

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Discussion

Get in Touch

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