

Pick a project to focus on for this presentation: _____

WIIFM? (What enhancements, changes, or new features in this project will be of benefit to your general user population?)

What do you think of when you hear the acronym OCM or the term organizational change management?

Common OCM tasks:

1. Stakeholder Assessment.
2. Change Readiness Assessment
3. Training Needs Assessment
4. Change Impact Assessment
5. Communication Plan
6. Feedback Loop
7. Suggestion Box
8. Town Hall Meetings
9. New Features Videos and Demonstrations
10. Posters
11. Newsletters
12. Articles
13. Emails
14. SharePoint or Intranet website

Evaluate your organization against this list above:

What does your organization already have established?

Newsletters or other written documents that are circulated monthly or quarterly?

Monthly or Quarterly All Hands or Large Group meetings?

Lunch related activities like a Lunch-n-Learn or similar?

What other regularly scheduled events or meetings does your organization have?

Does your organization already do some type of assessment or survey around your project topic?

What other ways to communicate your project goals, timeline, etc. can you think of?

Does your organization already do some type of assessment or survey around your project topic?

Assessments don't have to be complex!

My most common method for performing Training Needs Assessment is to schedule a demonstration (in person or virtually) and give everyone a half sheet of paper or online form with just 3 questions:

1. What are your thoughts on this change?
2. What level of training do you think you personally will need for this change?
3. Are there other things you wish you could be trained on during this change?

Remember! Stakeholders are not just the users of the software or process. Their supervisors and managers are also stakeholders. The person or team sponsoring your project is also a stakeholder. The people who support the process or software in your IT group are also stakeholders.

Who are the stakeholders for your project?

The **ADKAR Model** is a structured change management framework designed to help individuals successfully navigate and adopt change. Created by Jeff Hiatt, the founder of Prosci, the acronym stands for the five sequential stages an individual must achieve for a change to be successful.

The 5 Stages of ADKAR

1. **Awareness:** Understanding the need for change. This stage focuses on communicating *why* the change is happening and the risks of not changing.
2. **Desire:** The personal decision to support and participate in the change. This is often considered the most difficult stage as it involves personal motivation and securing "buy-in" from individuals.
3. **Knowledge:** Learning how to change. This involves providing the necessary information, training, and tools so individuals understand what is required of them.
4. **Ability:** Demonstrating the skills and behaviors needed for the change. This stage goes beyond theoretical knowledge, focusing on hands-on practice, coaching, and the actual implementation of new skills.
5. **Reinforcement:** Sustaining the change over the long term. This is achieved through feedback, recognition, performance metrics, and rewards to ensure individuals do not revert to old habits.

Kotter's 8-Step Change Model is a structured framework designed to help organizations implement large-scale change effectively. Developed by Harvard professor John Kotter, it focuses on building momentum and buy-in through urgency, coalition-building, strategic vision, empowerment, short-term wins, and anchoring new behaviors into the corporate culture.

The 8 Steps for Leading Change

Create a Sense of Urgency: Identify potential threats and develop scenarios to show why change is needed immediately to motivate people.

Build a Guiding Coalition: Assemble a group with enough power, credibility, and expertise to lead the change effort.

Form a Strategic Vision: Create a clear, actionable vision to direct the change effort and develop strategies to achieve it.

Enlist a Volunteer Army: Communicate the vision frequently to gain buy-in and encourage a large group of people to drive the change.

Enable Action by Removing Barriers: Eliminate obstacles such as inefficient processes, structures, or resisting individuals to empower employees.

Generate Short-Term Wins: Create, track, and celebrate visible, early improvements to maintain momentum and boost motivation.

Sustain Acceleration: Use the credibility from early wins to tackle bigger, more complex issues, pushing harder for change.

Institute Change: Embed the new behaviors, practices, and mindset into the organizational culture to ensure long-term sustainability