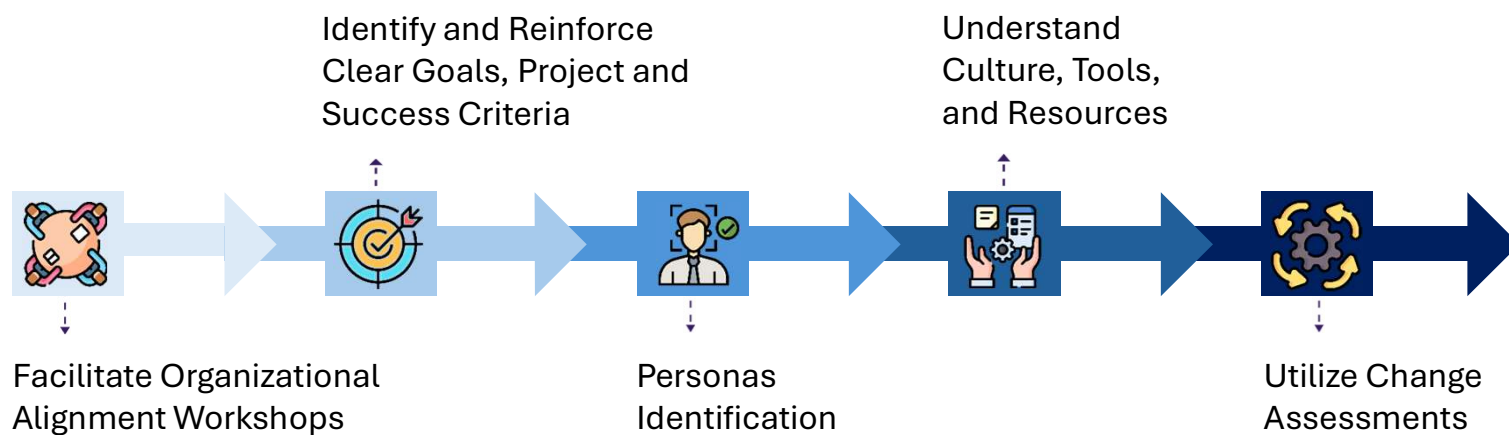# Understanding Cambay's
Change Management Assessment

Helping create an informed OCM approach for your organization
Duration: *4-6 weeks, depending on stakeholder availability*

Agenda

Understanding Cambay's Change Management Assessment

Identify and Reinforce Clear Goals, Project and Success Criteria

Understand Culture, Tools, and Resources

Facilitate Organizational Alignment Workshops

Personas Identification

Utilize Change Assessments

What is Cambay's Organizational Change Management Assessment?

Cambay's OCM Practice takes the time to fully understand the strategy behind your technology investment, and ensure your people are aligned with your strategy.

We identify the change characteristics unique to your project, clearly identify the impacted groups of people, and engage them to better understand the many aspects of change through conversation and assessment.

High-Level Overview

- Facilitate Organizational Alignment Workshops
- Identify and Reinforce Clear Goals, Project and Success Criteria
- Personas Identification
- Understand Culture, Tools, and Resources
- Utilize Change Assessments

Facilitate Organizational Alignment Workshops

We identify all members of client project team, begin relationship building.
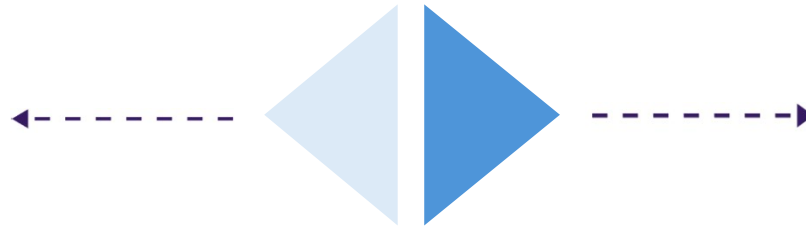
1:1 meetings with key sponsors, project members, and stakeholders to better understand current-state pain points, and how this project will help the client.

Identify and Reinforce Clear Goals, Project, and Success Criteria

Identify and Reinforce Clear Goals Project and Success Criteria

Fully understand and be able to share both the strategic and tactical.
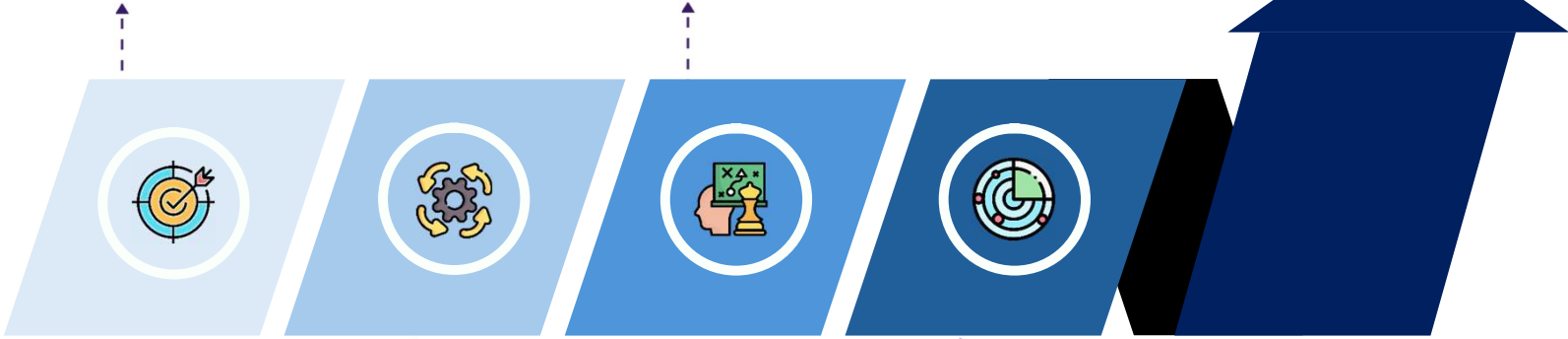
What is the 'why' behind this change for the client?

Ask, and be able to answer, "What are the key areas of change that will impact people?"

Personas Identification

Before we communicate, it is important to understand who we are communicating with.

Each group, or 'persona', will require targeted messaging to properly answer
'Why does this matter to me?'.

Executive Leaders	SMEs	Security Role Names	People in Security Roles	Front Line Leaders	Other Personas
Name/title of key organizational leaders (Executive sponsors, other leadership sponsors for functions impacted by the change i.e., AP, AR, HR, Warehouse, etc.) with emails.	Name/title of Subject Matter Experts (SMEs) in organization and Cambay involved in the project.	Verify the expected names of system roles/security names for the following deployments. These are the 'chairs' people will sit in inside the system.	Name/title of each person assigned to each role, or 'chair', named above, with email, for future communications.	Name/title of each person's SUPERVISOR, to help keep them informed of the change coming to their team/worker	Impacted groups unique to your project (vendors, etc.).

Understand Culture,
Tools, **and Resources**

Cambay's OCM Practice will take the time to fully understand the CLIENT'S communication and training culture, tools, and resources. We then incorporate this knowledge into our OCM recommendations.

CLIENT Communication:

- Engage CLIENT organization's communications department, if applicable.

- What are the best communication channels for each audience/persona, both technological or human?

- What is needed to keep executives updated by Exec Sponsor? (Decks, talking points, cadence, etc.). Are other executives whose functions are impacted engaged?

CLIENT Training:

- Clarify CLIENT training culture and processes to ensure alignment.

- Engage CLIENT organization's learning/training department, if applicable.

Utilize Change Assessments

Cambay's OCM Practice takes the time to fully understand the strategy behind your technology investment.

We identify the change characteristics unique to your project, clearly identify the impacted groups of people, and engage them to better understand the many aspects of change. Depending on your project, we will do so through one or more of the following assessments:

1. **Project Health Assessment** – Assess leadership, client, and the Cambay project team to ensure your project aligns people with technology.

2. **Change Risk Assessment** - Assess change characteristics and organizational attributes to determine the people risk profile for change

3. **Change Impact Assessment** - Assess the impact of change on groups (audience, stakeholders, personas, roles) using the 10 Aspects of Change Impact to identify the degree of change impact for each unique group.

4. **ADKAR Barrier Points** – Identify the Barrier Point for each impacted group to inform Sponsor, Communication, Training, Coaching, and Resistance Management plans.

Deliverable: A Tailored Change Management Strategy & Roadmap

A High-level Change Management Strategy:

- Informed by our best practice OCM assessment

Recommendations may include:

- Cambay facilitation toward building a Sponsorship Model of CLIENT leaders

- Building a Change Team involving CLIENT and Cambay resources to develop and deliver change plans.

Recommendations may include two or more of the following:

- Communication Plan

- Sponsor Roadmap Plan

- Training Plan

- Coaching Plan

- Resistance Management Plan

Estimate: ERP Assessment

*Average mid-market company, impacting 3-4 departments/functions*

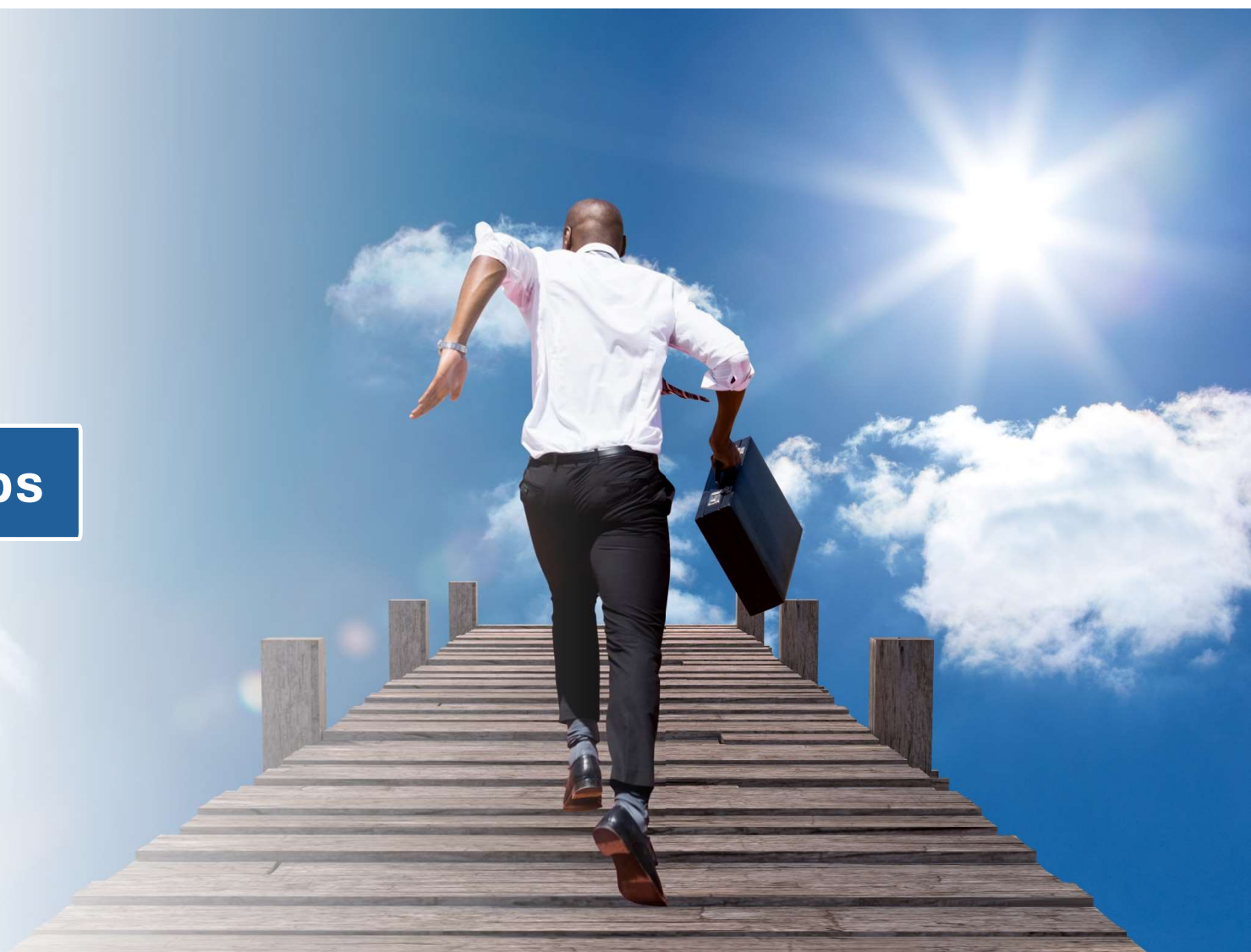| Milestones	Average Hours Per Activity	Duration (Weeks) *
OCM Kickoff & Ongoing Project Team Meetings	20	1
Facilitate Organizational Alignment Workshops w/ Impacted Departments	6	2-3*
Identify and Reinforce Clear Goals, Project and Success Criteria	12	2-3*
Personas Identification (Reach)	8	1-2*
Understand Culture, Tools, and Resources	12	1
Utilize Change Assessments	14	2-3*
OCM Assessment Analysis	12	1
Tailored Change Management Strategy & Roadmap	32	1
Readout	4	1
Totals	**120 Hours**	**4-6 weeks***
		* Dependent on stakeholder availability

Conclusion

1. Organizational Change Management is crucial for project success

2. Prosci's ADKAR model provides a structured and measurable approach to change

3. Technically success failures can be avoided with effective OCM

4. Real-world application of Dynamics 365 F&O highlights the importance of OCM
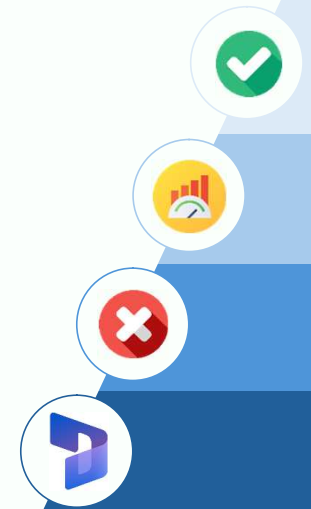
Final Thought: Integrating OCM from the start is essential to ensure both technical and business success of your investment

Next Steps

Thank You!