Fabric Adoption & Enablement through Effective Change Management: Foundations

Benefits of Change Management When Deploying Fabric

Reduce Cost Overruns

A smooth transition limits end-user productivity or dissatisfaction risks

Minimize Resistance

Get your business users on board - with a focus on the end user, we give you the tools to limit friction and increase utilization

Maximize Benefit Realization

Early adoption leads to early realization of effective change through data driven decision-making
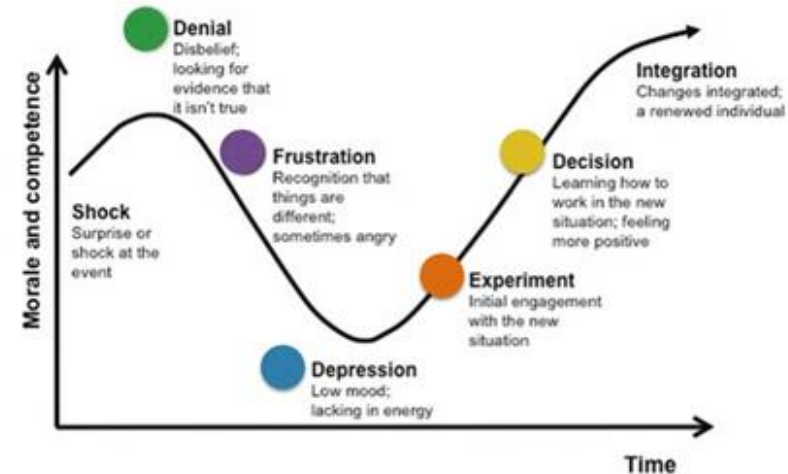
Stakeholder Visibility

Stakeholders understand the reality of what is happening on the ground

A project-based approach guiding you from assessment and planning to adoption and utilization

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A Fabric Migration can be stressful

- Anticipatory Stress: The Fabric application is a new tool and process for your end users to access and view their data. It will be crucial that a proper end user adoption plan is in place to manage migration stress.

- People, Process and Technology: Having buy in from all stakeholders involved, a process for removing roadblocks and ensuring an appropriate technology architecture is established will lead to a smooth transition.

- A well-designed change management plan for Fabric can decrease the length and time of the curve, decreasing the impact to your end users and driving adoption.

The Kübler-Ross change curve

Denial Disbelief; looking for evidence that it isn't true

Integration Changes integrated; a renewed individual

Frustration Recognition that things are different; sometimes angry

Shock Surprise or shock at the event

Decision Learning how to work in the new situation; feeling more positive

Experiment Initial engagement with the new situation

Depression Low mood; lacking in energy

Morale and competence / Time

Create Alignment

Maximize Communication

Spark Motivation

Develop Capability

Share Knowledge

Change Management is MORE Important than you think

- Even though companies make significant investments in change management efforts, 60-70% of Change Management efforts fail. (1)

- Projects with excellent change management were 7x more likely to be successful at meeting project objectives when compared to projects with poor change management efforts. (2)

- Projects with poor change management planning were only 3x successful at meeting project objectives. (2)

- 77% of companies with high change effectiveness say they are effective at forming a sense of ownership regarding organizational change initiatives (3)

- 47% of companies who integrate change and project management report meeting or exceeding their change objectives, which compares to the 30% of those who don't (4)

Change Management drives ROI and has a positive effect on employee satisfaction

Percentage of Respondents That Met or Exceeded Project Objectives

88%
73%
39%
13%

7X

3X

Poor   Fair   Good   Excellent

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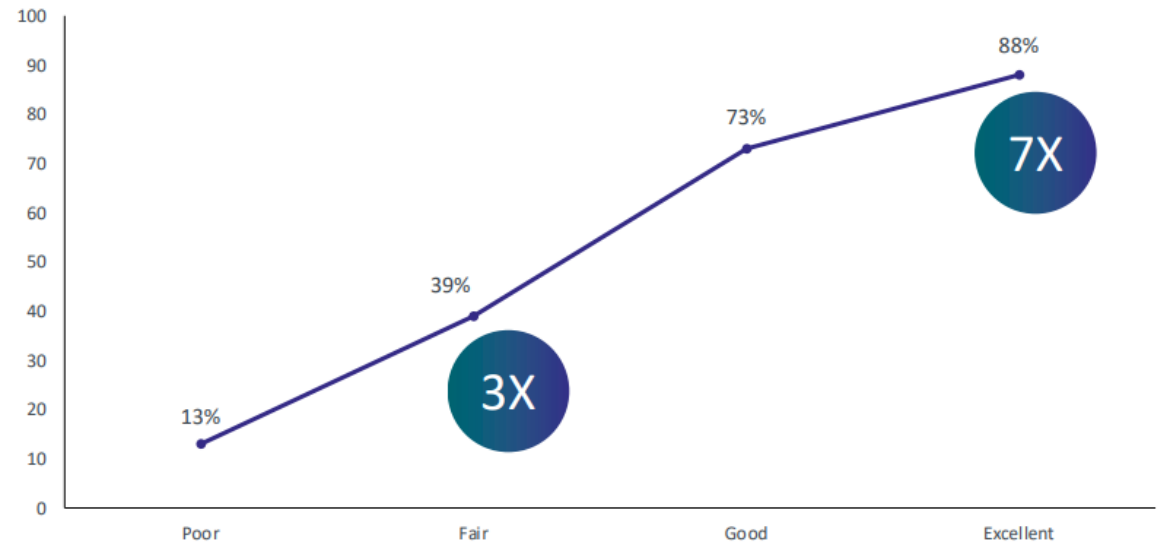
Benefits of Change Management and End User Adoption Training for Fabric

Robust Analytics

- End users have access to deeper data tools
- Streamline access to data and report creation
- Leverage data to make informed business decisions
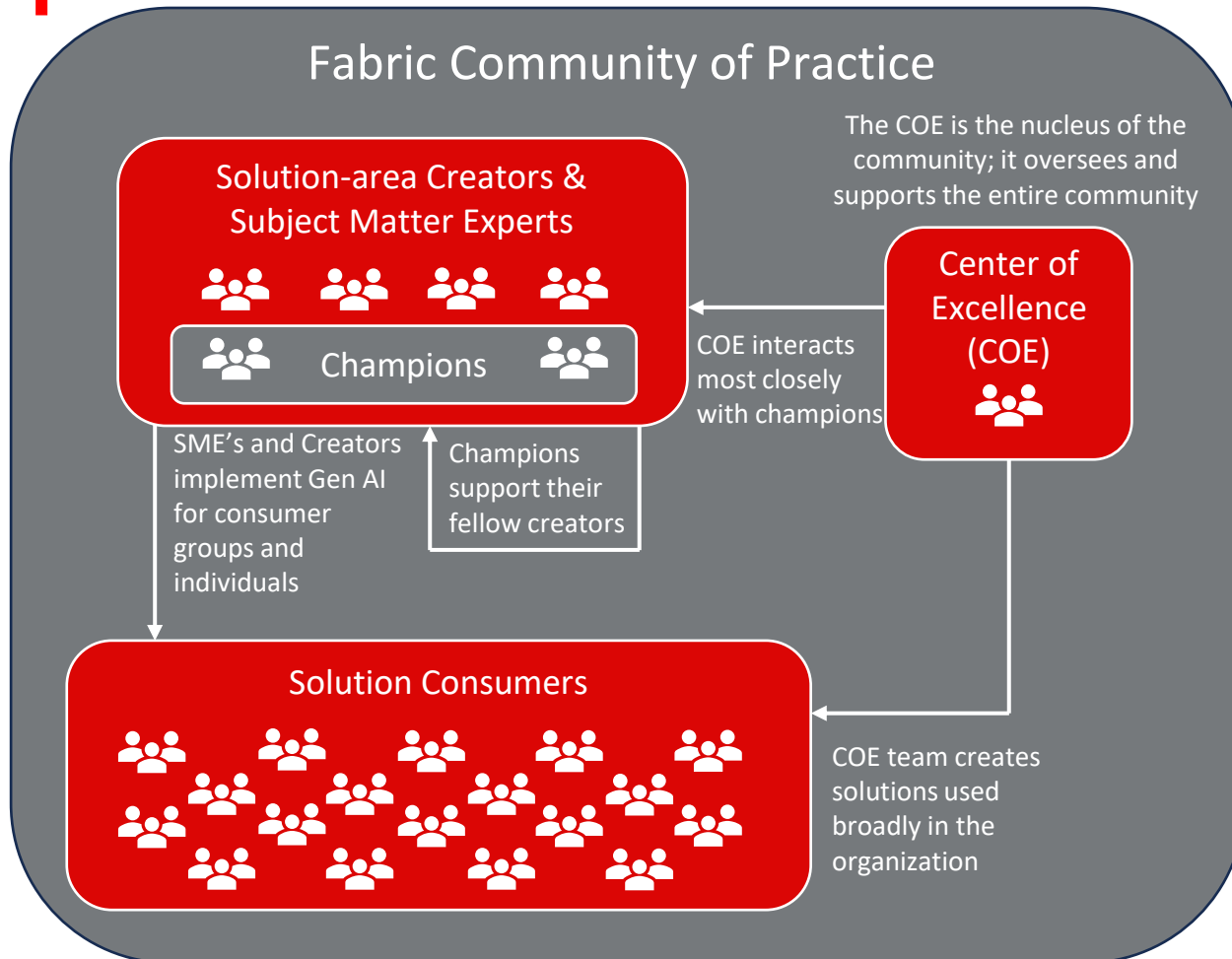
Communication

- Detailed communication plan for Fabric migration
- Drive end user consumption
- Increase stakeholder satisfaction & engagement

Training and Support

- Training plans and instructional content for end users and business users
- Expert guidance on creating a Community of Practice
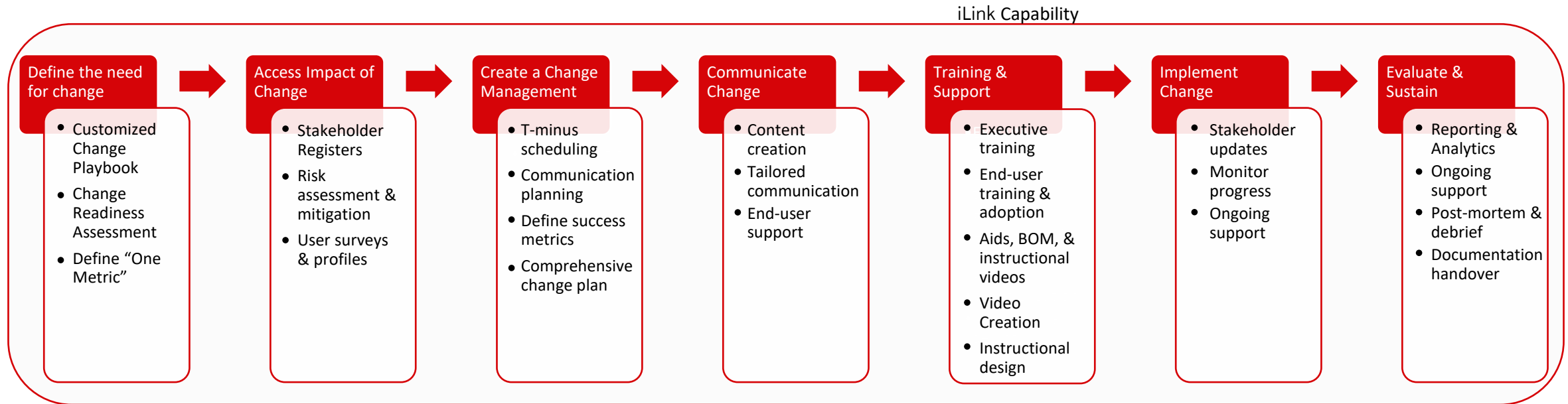- Analytics and reporting for end user adoption

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Building a Center of Excellence

Fabric Community of Practice

Solution-area Creators & Subject Matter Experts

Champions

The COE is the nucleus of the community; it oversees and supports the entire community

Center of Excellence (COE)

COE interacts most closely with champions

SME's and Creators implement Gen AI for consumer groups and individuals

Champions support their fellow creators

Solution Consumers

COE team creates solutions used broadly in the organization

- Community of Practice (COP) is the community of users, supported by the COE as well as through knowledge sharing with other community members

- Center of Excellence (COE) is a centralized center of expertise and supports the community of practice
  - Creates guidelines, templates, and best practices
  - Provides training for consumers
  - Curates instructional content (user guides, process & job aids, video walk-throughs)

- Goals: Drive meaningful organizational change throughout the organization through a structured approach that combines project management and change management

- With this workshop we will give you the tools and guidance to create your own COE and reap its benefits

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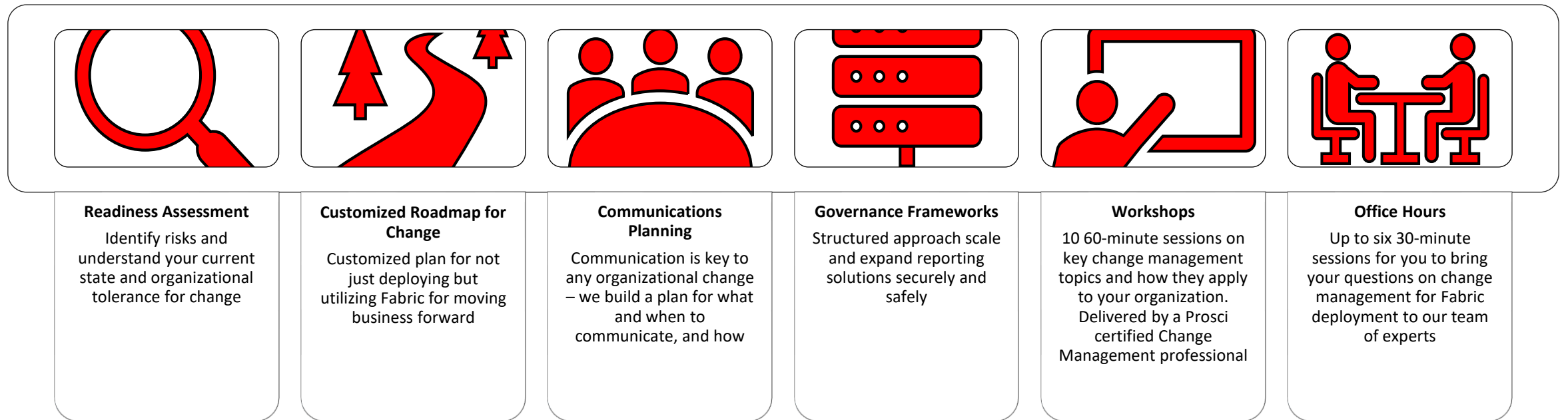# Fabric Change Management & Adoption Roadmap

Steps for Fabric adoption

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Define the need for change	Access Impact of Change	Create a Change Management	Communicate Change	Training & Support	Implement Change	Evaluate & Sustain
• Customized Change Playbook • Change Readiness Assessment • Define "One Metric"	• Stakeholder Registers • Risk assessment & mitigation • User surveys & profiles	• T-minus scheduling • Communication planning • Define success metrics • Comprehensive change plan	• Content creation • Tailored communication • End-user support	• Executive training • End-user training & adoption • Aids, BOM, & instructional videos • Video Creation • Instructional design	• Stakeholder updates • Monitor progress • Ongoing support	• Reporting & Analytics • Ongoing support • Post-mortem & debrief • Documentation handover

With this workshop we will use the Operational Change Management philosophy to implement Fabric into your organization

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Change Management for Fabric Enablement Foundations

Giving you the tools to drive successful organizational adoption of Fabric

- **Who Benefits**: Stakeholders, Executive Leadership, BI & Admin, and Business Users

- **Ideal Customers**: Companies who want to not just migrate but **adopt** Fabric and drive data-driven decision-making

- **Results**: Achieve the benefits you set out for with effective end user preparation and adoption support

Readiness Assessment

Identify risks and understand your current state and organizational tolerance for change

Customized Roadmap for Change

Customized plan for not just deploying but utilizing Fabric for moving business forward

Communications Planning

Communication is key to any organizational change – we build a plan for what and when to communicate, and how

Governance Frameworks

Structured approach scale and expand reporting solutions securely and safely

Workshops

10 60-minute sessions on key change management topics and how they apply to your organization. Delivered by a Prosci certified Change Management professional

Office Hours

Up to six 30-minute sessions for you to bring your questions on change management for Fabric deployment to our team of experts

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Organizational Change management (OCM) & End User Adoption

A Fortune 1000 food services company wanted to migrate existing operations and employee training reports from MicroStrategy to Power BI.

Situation

The project scope largely focused on the **migration of user dashboards**; however, they needed support in driving effective end-user change across retail locations.

Challenges included providing a change management strategy that could be deployed across myriad retail locations, owners, operations, and end-users, including single store operations to regional operations. End-users were mostly franchisees who were unfamiliar with Power BI's features and functionality.

The process would introduce a new mobile reporting access and the login experience was going to be challenging. There was a **significant risk factor that the new reporting method would cause work delivery issues and impede rhythm of business**.

Solution

- Engaged with stakeholders to understand concerns and the existing environment to **develop an effective change management plan and approach**.

- **Strong communication** to enable the support desk team to respond to increase volume of support requests.

- Provided clear project deliverables leading up to go-live – including PoC structure, support, and feedback gathering.

- **Cross-organization collaboration** for OCM activities, including HR, IT, Communications, Operations, and Franchising teams.

- Created dashboard aids to provide a business level breakdown of data and background.

Business Impact & Results

✔ **Help Desk support ticket traffic was significant less than expected** due to the successful delivery of the Power BI end user training aids.

✔ Drove over **27000 page views within first 30 days** of deployment

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Job Aids

Power BI and Excel Export Training Aid

G **Excel Export:** This is the Excel export option window. Make the appropriate export selections and export to Excel, summarized data is preferred

H **Summarized Data:** Select this option when exporting your data from the visual into Excel

I **Excel File Format Options:** Selection options for exporting your data. You will want to select the .xlsx (Excel 15,000 row max) option

J **Excel Export View:** This is how the data will appear in Excel once exported from the Power BI visual

K **Excel Export Table and Filters:** By setting filters in Excel you can interact with your data.

Power BI Introduction Training Aid

Description: This is a technical aid that covers the new Power BI experience and features. * The Learn!Now Power BI dashboard is being used for demonstration purposes only

C **Dashboard List:** This is a list of dashboards available, specific to user credentials. This list can be condensed by selecting the collapse icon <<

D **Selected Dashboard from list:** This is the selected dashboard, within each dashboard there may be additional reports that can be selected. Use the ˅ to expand the dashboard list

E **Displayed Dashboard:** This is the displayed dashboard based on the dashboard selected form the list. Switch to a different dashboard by selected another dashboard from the dashboard list

F **Filters:** This is the filters selection tool. Here you can select and apply filters specific to the selected dashboard if available

G **Go Back:** Select this to "Go Back" to the previous screen you were on

A **Dashboard Tool Bar:** The tool bar contains a number of features

File: A list of options such as save a copy and print report

Share: A list of options for sharing the selected dashboard

Export: A list of options for exporting the dashboard to other Microsoft applications

Chat in Teams: Allows for you to integrate the dashboard and data within Teams

Get Insights: Opens the Insights pane. The Insights pane currently shows three types of insights – Anomalies, Trends, and KPI analysis

Subscribe to Report: Allows the user to subscribe to the Power BI report and sends the user updates via email

B **Reset Looping Arrow:** Allows for the user to reset dashboard to default settings if changes have been made

Bookmark Icon: Allows the user to add this to their bookmarks for future reference

Rectangle Icon: Allows the user to adjust the view of the dashboard (full screen, fit to screen, etc)

Refresh Looping Arrow: Allows the user to refresh the dashboard based on data added

Comment Icon: Allows the user to add a comment about the dashboard

Star Icon: Adds dashboard to favorites

*additional costs for job aid creation

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Dashboard Guides

Power BI Dashboard Data Explained

Description: The LEAD Dashboard is a high-level overview of manager training completions. Each role has a separate requirement to show complete here, however, all manager roles require the completion of at least one of the Store Manager curricula.

Assistant Managers: Store Manager + Shift Leader

RGM: Store Manager + LEAD RGM (Legacy) and/or Lead On! RGM

Area Coach: Store Manager + LEAD AC (Legacy) and/or Lead On! AC

A   Lead Summary: The Lead Summary report breaks down the Lead completion rate of management roles. Shift Leaders are marked complete with a Store Management curriculum as well as Lead On! Shift (or equivalents). RGMs and AMs are marked complete with a Store Management curriculum, Lead On! Shift and Lead On! RGM (or equivalents).

B   Overall: % Completed is what % of Assigned people did it. % Overall is the % of all managers of that role that completed whether assigned of not. So if you had 20 managers, 18 assigned and 9 complete: 90% assigned, 50% complete and 45% overall.

C   Lead On! Area Coach: Gives an overview of Area Coaches who have completed Lead On! Area Coach or an equivalent. Only Area Coaches and above have access to this report. Note: Only AC's that are assigned training will show on this report. The overall % complete takes all of the organizations AC's into consideration, but they only show in the list if they're assigned. If you don't see an AC on the list, please have them assign themselves the Lead On! Area Coach learning experience.

D   Lead Progress Report: Shows the completion of the Store Manager, Lead On! Shift and Lead On! RGM curriculum (or LEAD equivalent) and details for in-progress managers. If one of the colums is blank, that means the curriculum has not been started. If it shows 0% it means the learner has clicked on the title to begin. Note: One of the Store Manager curricula (Delco, RBD, DBR, RR), in addition to Lead On!, is also required for managers to be 100% complete.

*additional costs for dashboard guide creation

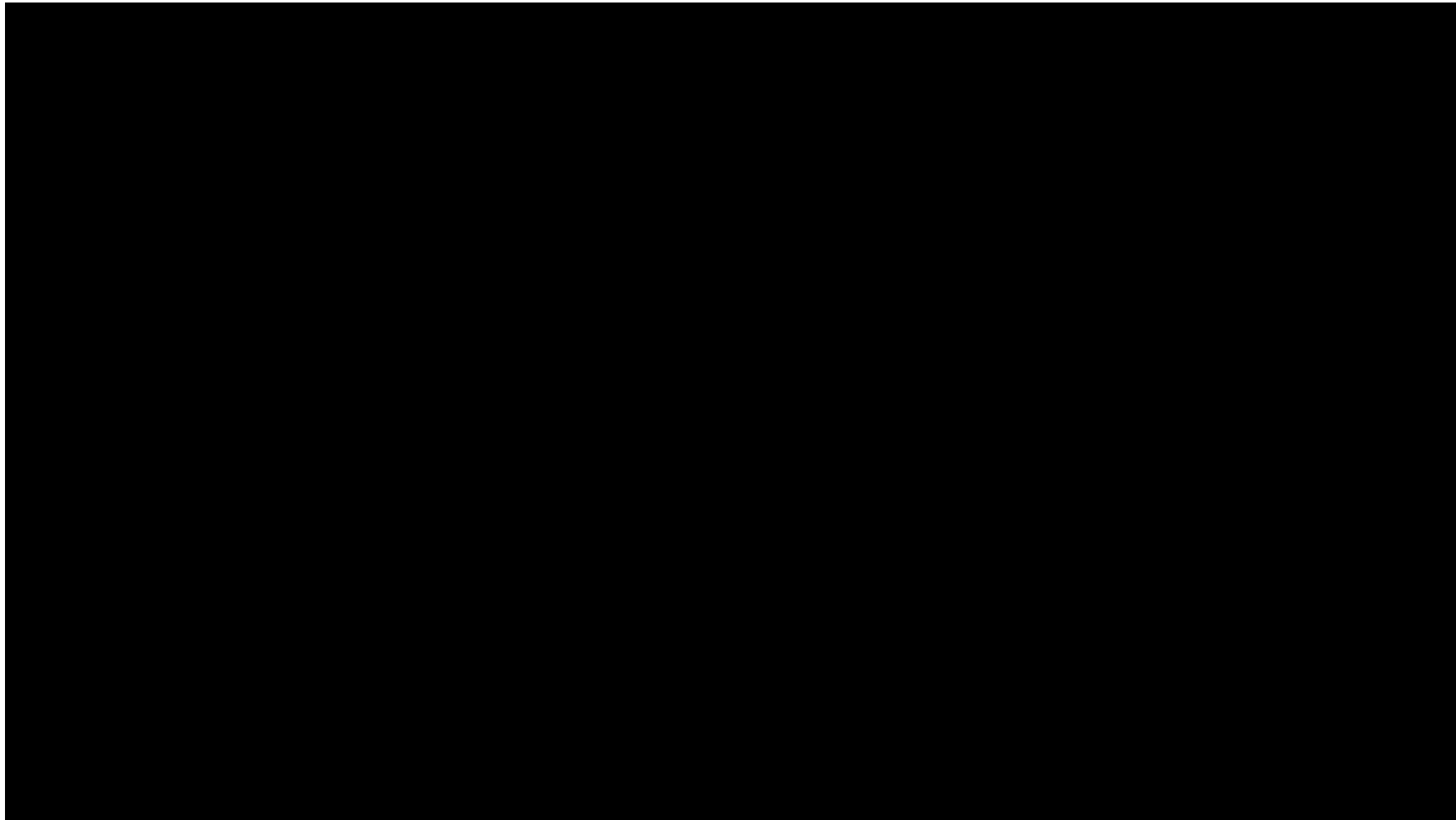## Power BI Dashboard Data Explained

Description: The Exceptions Report shows everything that's assigned to a Team Member. This includes anything auto-assigned, such as new hire training, plus anything that the Team Member assigned to themselves

Please note that *All Roles Power Up* was made into a separate (Required) curriculum for new hires and is part of all new hire Focus Areas in **Learn!Now**, which is why it's seen separately here

A   Report Filters: Allows you to apply filters to the displayed report

B   Selection Criteria: Allows you to add a column to the below data table based on, Region, Area and Restaurant

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Instructional Videos

*additional costs for instructional video creation

Thank You!

Ready to get started? Have additional questions? Contact cmsales@ilink-systems.com for more information.

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References

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