



PHFA

Workday Connect

Presented by:

Kim Burky

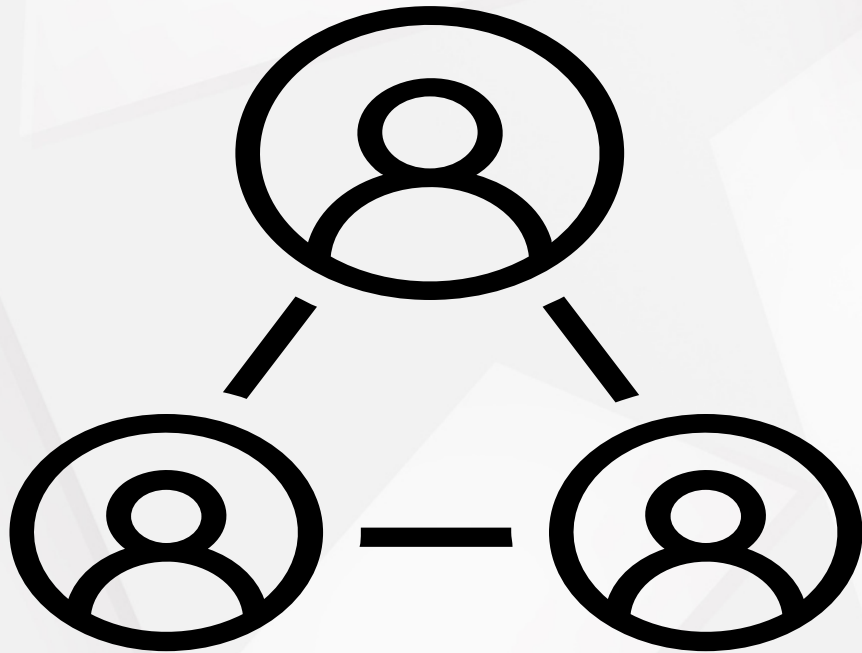
PHFA Sr. Director, Transformation & Operations

Ami Davidson

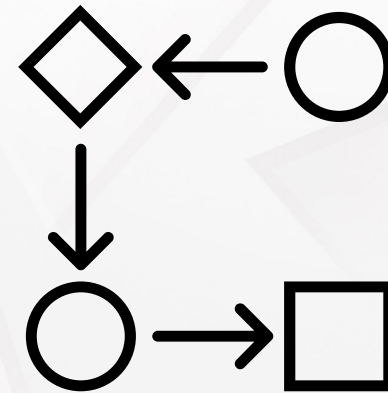
Meridian Partners, Senior Consultant/OCM Lead



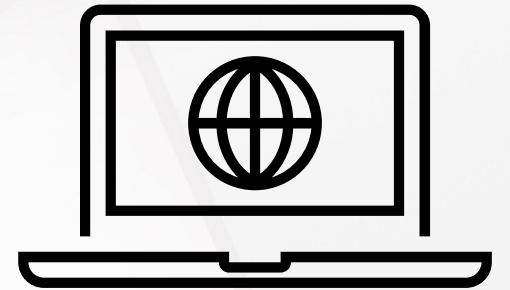
People



Process



Platform



Organizational Change Management and Adoption

Know your audience - Assess the change - Prepare them for the change



The Importance of Org Change Management

Communication – Training – Adoption



Organizational Change Management (OCM) is the process of planning, implementing, and managing changes to ensure they are adopted and effectively integrated into the organization's culture, processes, and systems.



By utilizing a **standard process and toolkit of best practices** that are flexible enough to embrace an organization's unique culture, associates are part of the journey and actively engaged with pending changes.



OCM ensures that the ERP implementation is successful by promoting stakeholder buy-in, reducing resistance to change, improving communication, providing training, and fostering a culture of continuous improvement.



Someone needs to hear a message **14 times** before they will act based on that message.

Change is Hard!

“ 70% of change programs fail to achieve their goals, largely due to employee resistance and lack of management support. We also know that when people are truly invested in change it is 30% more likely to stick.”

-- Changing Change Management, McKinsey



This Photo by Unknown Author is licensed under [CC BY-SA-NC](#)



This Photo by Unknown Author is licensed under [CC BY-SA-NC](#)

OCM Deliverables – PHFA Example

by Methodology & Project Phase

OCM Deliverable	Workday Methodology Phase
Case for Change and Change Blueprint	Plan
Stakeholder Analysis	Plan
Impact & Reaction Assessment	Plan
Start, Continue, Stop Review	Plan
Change Management Risk Assessment	Architect & Configure
Communication Plan	Architect & Configure
Change Agent Network Creation	Architect & Configure
Enablement Plan	Architect & Configure
User Training Development	Architect & Configure
Communication Execution	Architect & Configure, Test, & Deploy
Adoption Event Execution	Deploy
User Training Execution	Test
Sustain Outcomes Plan	Post-Production



OCM Approach



Assess Change

Case for Change

What is the value proposition/reason to change?

Stakeholder Analysis

Who is directly and indirectly impacted by the change?

Impact & Reaction Assessment

What is the impact to a "day in the life"?
How will people feel about that impact?



Drive Adoption

Change Management Strategy

What tactics are required to drive adoption and overcome resistance?

Change Management Plan

What steps, owners, and timing are needed to implement the change management strategy?

Sustainment Plan

What activities need to occur to sustain the change & make it stick?

OCM Details

WHAT & WHY? For any significant implementation to be successful, employees must be informed, motivated and properly trained. Studies show that organizational change management (OCM) is a critical factor in implementation success, and that poor change management is the leading cause of implementation failure. OCM focuses on the people side of change with the primary goal of ensuring adoption and, ultimately, ensuring your implementation will be successful.



OCM Strategy

What tactics are required to drive adoption and overcome resistance?



Communications

- Leadership Guidance
- Announcements
- Email Communications
- SharePoint
- Microsoft Teams



Learning & Support

- Training
- Toolkits
- Briefing Sessions
- Office Hours



Incentives & Consequences

- Awards & Recognition
- Best Practice Sharing
- Shared Experiences
- Leadership Roundtables



Compliance

- Measurement & Metrics
- Governance
- Performance

Plan Your Course

- Outline of Scope
- Business Benefits
- Definition of Success
- Approximate Schedule
- Budget Estimate
- Anticipated Risks
- Key Stakeholders
- Roles and Responsibilities
- Process for Decision-Making
- Meeting Types and Cadence



Set Project Guiding Principles

Guiding principles provide a framework for ethical, consistent, and effective decision-making throughout the project lifecycle. They promote alignment, empowerment, and adaptability, ultimately contributing to the success and sustainability of the project.

- Be healthy - Be well - Have fun
- Everything should be made as simple as possible, but no simpler
 - Target simplicity
- If you're proactive, you focus on preparing - If you're reactive, you end up focusing on repairing
 - Be proactive, insightful, and responsive
- Fast is fine, but accuracy is final - In a gunfight, you need to take your time in a hurry
 - Navigate roadblocks but take time to get things right
- Bad news is not wine - it does not improve with age
 - Know when to escalate
- Nobody sees your whiteboard
 - Communicate out your status

Create a Project Plan

- During project initiation, we review the signed SOW and proposed high-level timeline to develop an initial project plan
- Project plans are one of the first steps in managing tasks and implementing project control
- Project plans organize projects into phases and tasks:
 - Project plan phases organize and sequence each stage of the project work. Example: Plan and Testing
 - Project plan tasks define the work details in each project phase. Example: Develop End User Training Materials
- Project plans enable you to:
 - Assign resources to project plan tasks
 - Monitor project timelines
 - Specify project risks
- Streamline data entry by creating templates
- Stay in alignment with your business requirements

Task Management

Effective task management is essential for ensuring that projects are completed on time, within budget, and with the expected quality standards. It provides the framework and discipline necessary to turn project plans into successful outcomes.



Information Management

- How are you going to organize information?
- How are you going to protect sensitive information?
- How are you going to communicate tasks and updates?



Risk Management

Risk management is important because it helps project teams anticipate, assess, and mitigate potential threats, ultimately increasing the likelihood of project success and delivering value to stakeholders.



Common Risks

Here are examples of risks that projects experience:

Risk	Potential Impacts	Sample Mitigating Actions
Insufficient and / or inappropriate resources allocated to the project	• Timeline: competing priorities could impact ability to meet deadlines, resulting in delays	• Provide backfill resources to ensure sufficient time available from key resources • Ensure project tasks assigned to team members do not exceed their available capacity
Lack of dedicated & knowledgeable change management resources	• Timeline: lack of attention to change management plans throughout project could result in the need to delay go live in order to prepare	• Provide training in change management to team members who are assigned these tasks
External vendors may not be fully committed or able to deliver to the project timelines	• Timeline: reliance upon external vendors to contribute to and deliver on could lead to delays	• Communicate deadlines early and check in on progress frequently; Escalate issues immediately • Engage with external vendors early in the project

RAIDQ Management

Risk, Action, Issue, Decision Question



An “issue” is any open item what-so-ever that is preventing you from completing your work **right now**



Team members are responsible for managing all issues in their workstream



All issues should be logged in the RAIDQ log in real time, and kept up to date



Options should be provided to Project Management to facilitate resolution



Complex issues may require the use of an issue resolution document to help define the issue and help understand the options



Potential product issues should always be escalated directly with your system implementer

FIRST
ATTEMPT
IN
LEARNING



Key Ingredients

- Plan and prepare for better results
- Start with people: org change management strategy and plan
- Make sure everyone understands the requirements and scope
- Know your stakeholders and communicate, communicate, communicate
- Create a project plan and include what needs to be done, by when, by whom (tasks, milestones)
- Manage risk (RAIDQ) and be prepared
- Continuously align people, process and platform
- Have fun and don't be afraid to try new things
- Learn from your mistakes

