

ACMP Standard Review

for CCMP Applicants & Aspiring Change Leaders

Session #7

**Complete the Change Management Effort,
and Process Groups Mapped to Subject Groups**

May 2022



ACMP
Ontario Chapter



ACMP
Ontario Chapter

Today's Team

Program Architect and Facilitator

ALAN BOSTAKIAN

PhD, CCMP, Prosci, CCA, CTDP, RPT

*Director of Professional Development
at ACMP Ontario*

And

*Sr. Manager - Change Management
at Scotiabank (head-office)*

And thanks to Jeff Kerr and
ACMP Ontario team members
for continuous support.

Guest Speaker

SHANNON FILICE

MBA, PMP, CPC

*Management Consultant, Optimus SBR
Founder, Shannon L. Filice Coaching & Consulting*

Breakout Session Lead

(Volunteer for today's session)

DIANE SARAH BÉGIN

CHRL, Prosci, GPHR

*Senior Consultant and Solopreneur
HR, OD, CM and Strategy*



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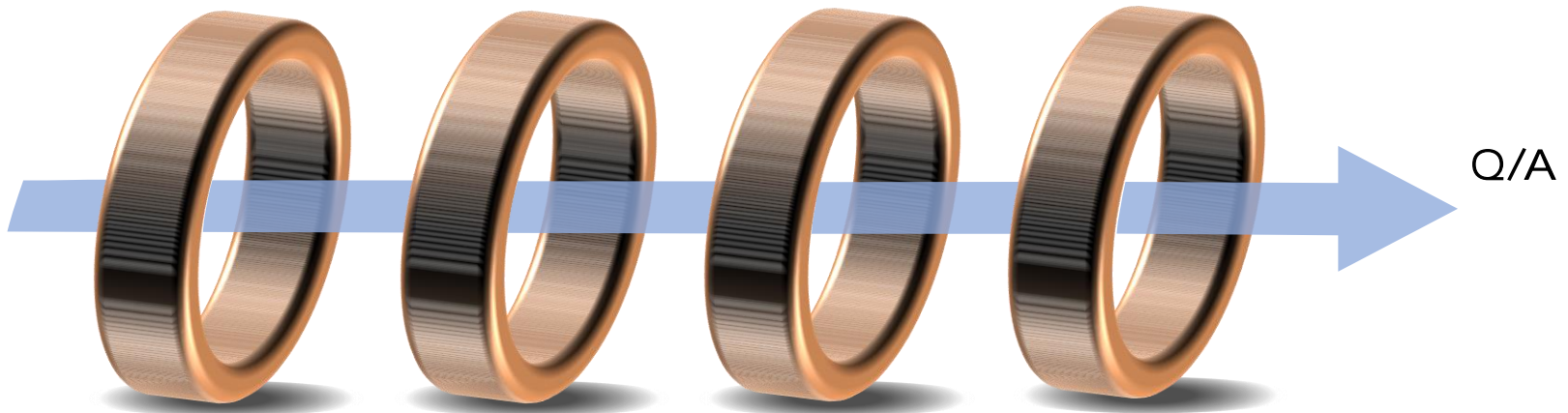
Today's journey

Complete the
Change
Management
Effort

The Processes,
and Process
Groups
Mapped to
Subject Groups

Lessons-
learned and
real-
experience
examples

Breakout
Session



Q/A

Change Management Process Groups



Process Groups:



Complete the Change Management Effort

To reinforce the work in the plans, determine the effectiveness of the work, monitor progress, and transition to the business.

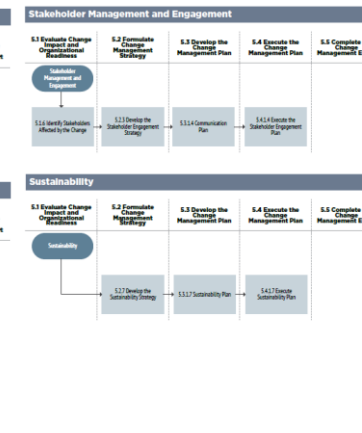
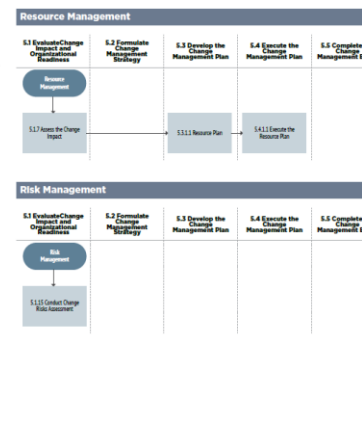
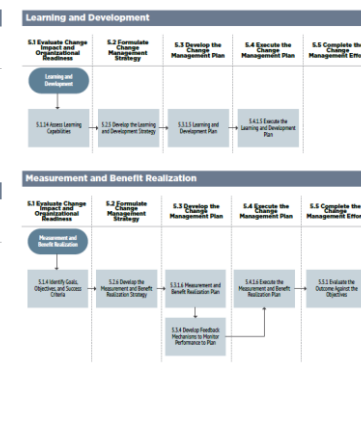
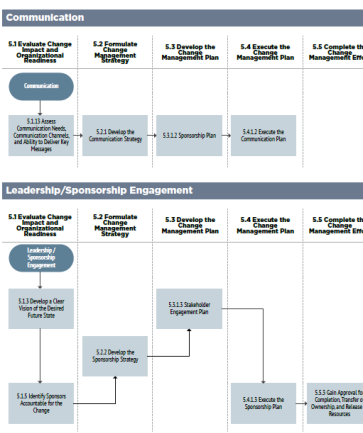
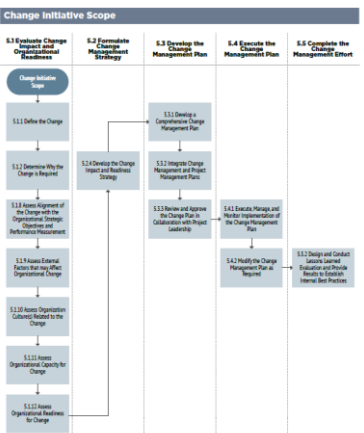
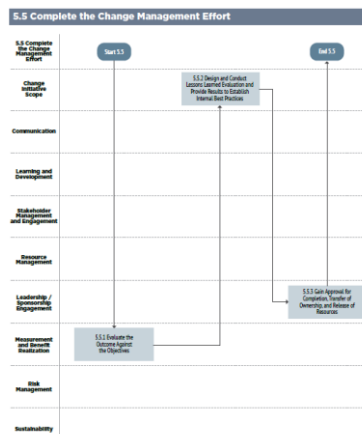
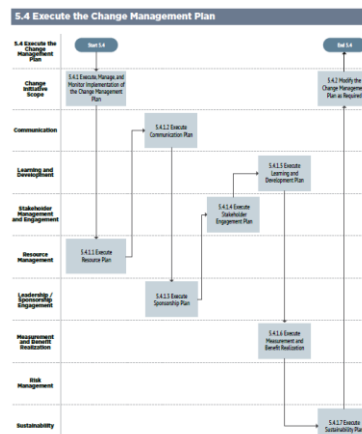
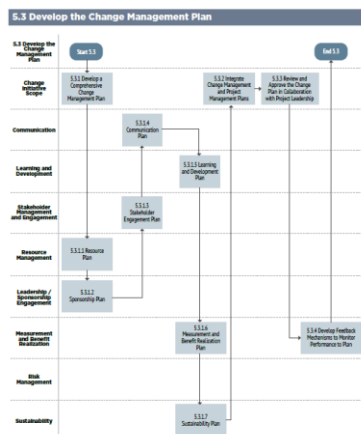
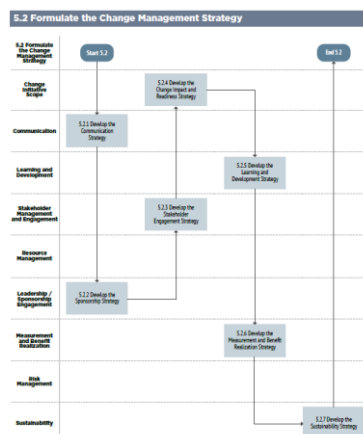
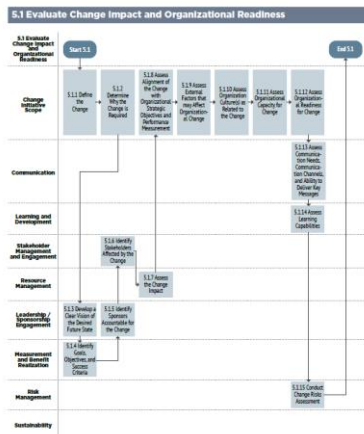


3 Processes

(included in the “Complete the Change Management Effort ” process group)

| Process | Purpose (summarized) |
|---|--|
| <i>Evaluate the Outcome Against the Objectives</i> | Comparing the outcomes of the effort against the change objectives and project objectives, documenting the outcome of the comparisons, and reviewing outcomes with leaders/stakeholders |
| <i>Design and Conduct Lessons Learned Evaluation and Provide Results to Establish Internal Best Practices</i> | Evaluating the success or adoption outcomes, documenting what went well, recording learnings, and sharing improvements for future programs with other CM practitioners or organizations. |
| <i>Gain Approval for Completion, Transfer of Ownership, and Release of Resources</i> | Gaining approval for completion from the stakeholders, committee, sponsor, or client, transferring ownership of all change outcomes, and making change resources available for use in other change efforts |

Process Groups Mapped to Subject Groups





**Shannon is sharing examples
and real experiences about:**

**Complete the Change
Management Effort**



How to evaluate the outcomes of a change effort when the objectives were not well defined at the outset

Shannon L. Filice



Context

- \$300M+ transformation
- Impacting 3K+ internal stakeholders and 500K+ external stakeholders
- Objective: substantial improvements in service excellence and financial responsibility
- Transformation Program absorbed several in-flight projects – accountable for the outcomes
- Pulled into a project just weeks before go live to manage the change...



The Problem

How to recover best practices in change management when being assigned to a project at the mid-point

- Unclear governance
- Well established project team on the ground – didn't need us
- Needed to quickly get up to speed
- New enterprise change management framework – needed to quickly populate to get to compliance
- Unsure what had, and had not, been completed from a change management perspective
- Amongst others, required inputs to evaluate the outcome against the objectives (Complete the Change Management Effort) missing
 - ☐ Change objectives and goals not defined at the outset of the project
 - ☐ Some measures but no formal measurement and benefit realization plan
 - ☐ No sustainability plan



The Solution

Identify and prioritize gaps

1. Audited the existing change plans/work to identify gaps
2. Prioritized the gaps (important/urgent)
3. Validated and negotiated path forward

Close the gaps

1. Pulled information we needed from what was already available
2. Made assumptions and pre-populated templates for validation
3. Approached project with a flexible, service-orientation

Leverage relationships

1. In absence of defined governance, used relationships for quick decision-making
2. Relied on relationships to get information needed to support the change effort
3. Actively nurtured new and existing relationships to work towards achieving a common goal



The Outcome

Select Project Outcomes

- ✓ 25% uptake in first 3 months (exceeded expectations)
- ✓ 140% improvement in customer satisfaction

By-products

- ✓ Established reputation as a helpful change partner
- ✓ Built solid relationships based on mutual respect
- ✓ Team gained valuable experience using the new framework

Completing the Change Management Effort

Evaluating the outcome

- ✓ Compared outcomes against objectives
- ✓ Documented and shared with leadership

Lessons learned

- ✓ Elicited and documented lessons learned to be applied to future projects

Approval, transfer ownership, release resources

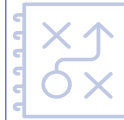
- ✓ Successful transition to maintenance/sustaining activities
- ✓ Ownership transferred from change team to the business
- ✓ Change resources shifted to other projects within the program

Summary

The 3 critical success factors to setting and evaluating change objectives so late in the game:



Identify what's
necessary vs nice to
have



Get what you need
without getting in
the way



Leverage
relationships to
achieve your
mission

The program

Guest Speakers:



Thank You!



| | |
|--|----------|
| • Revenues..... | \$13,188 |
| • Event Fees and Sponsorships..... | \$ 3,381 |
| • Rebates from Global..... | \$ 9,807 |
| • Expenditures..... | \$ 6,365 |
| • Net Income..... | \$ 6,823 |
| • Balance of funds (as of Jun 10, 2019)..... | \$15,824 |
| • BMO GIC (as of Jun 10, 2019)..... | \$ 2,500 |

