



IBM Cognos Forum

Ignite knowledge, ideas, connections

Implementing Enterprise Change: *People, Process, Platforms*

Information Management

Cognos.
software

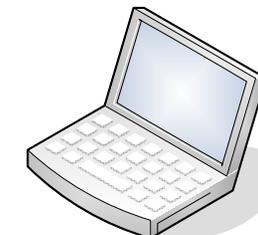
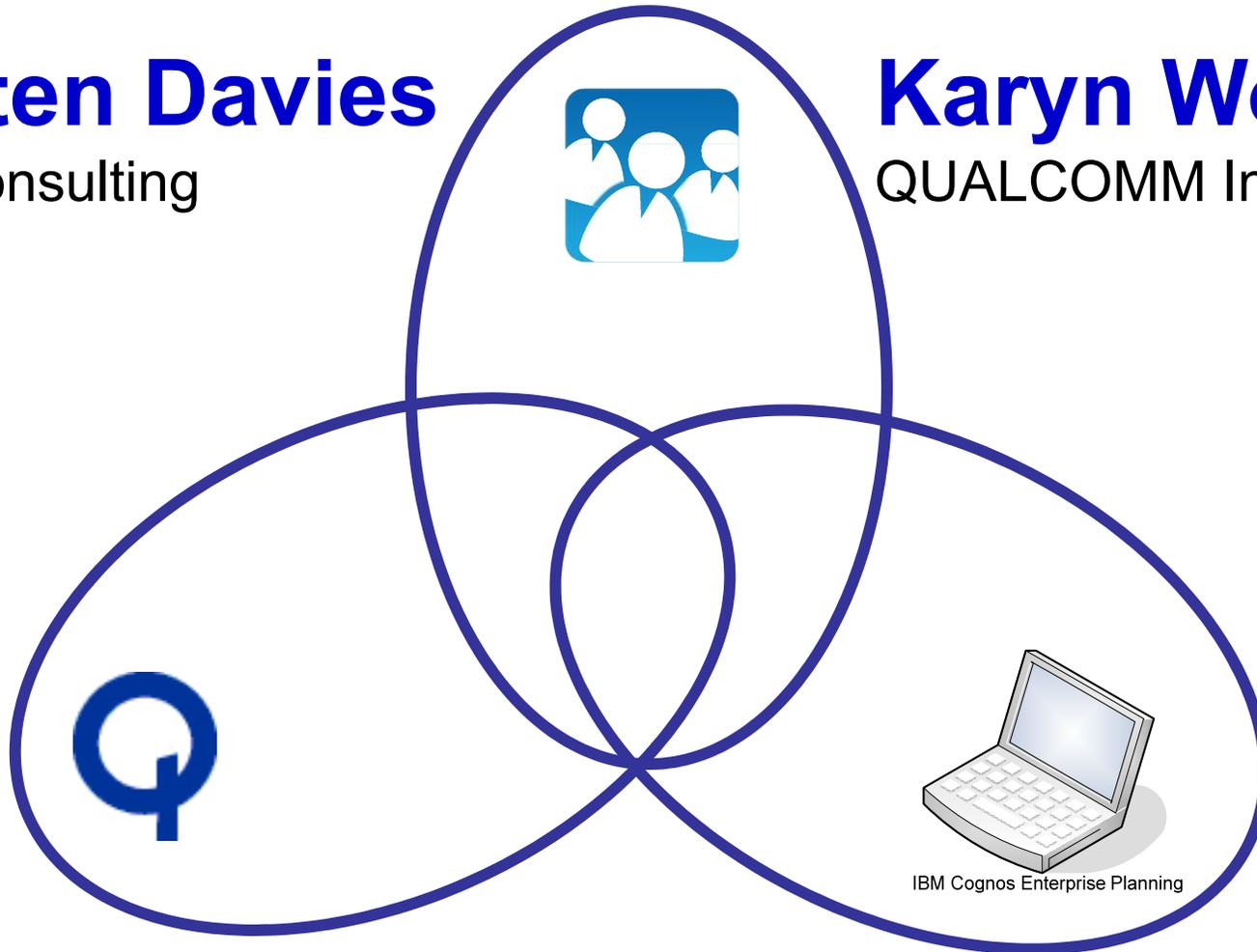
Kirsten Davies

KDC Consulting



Karyn Womach

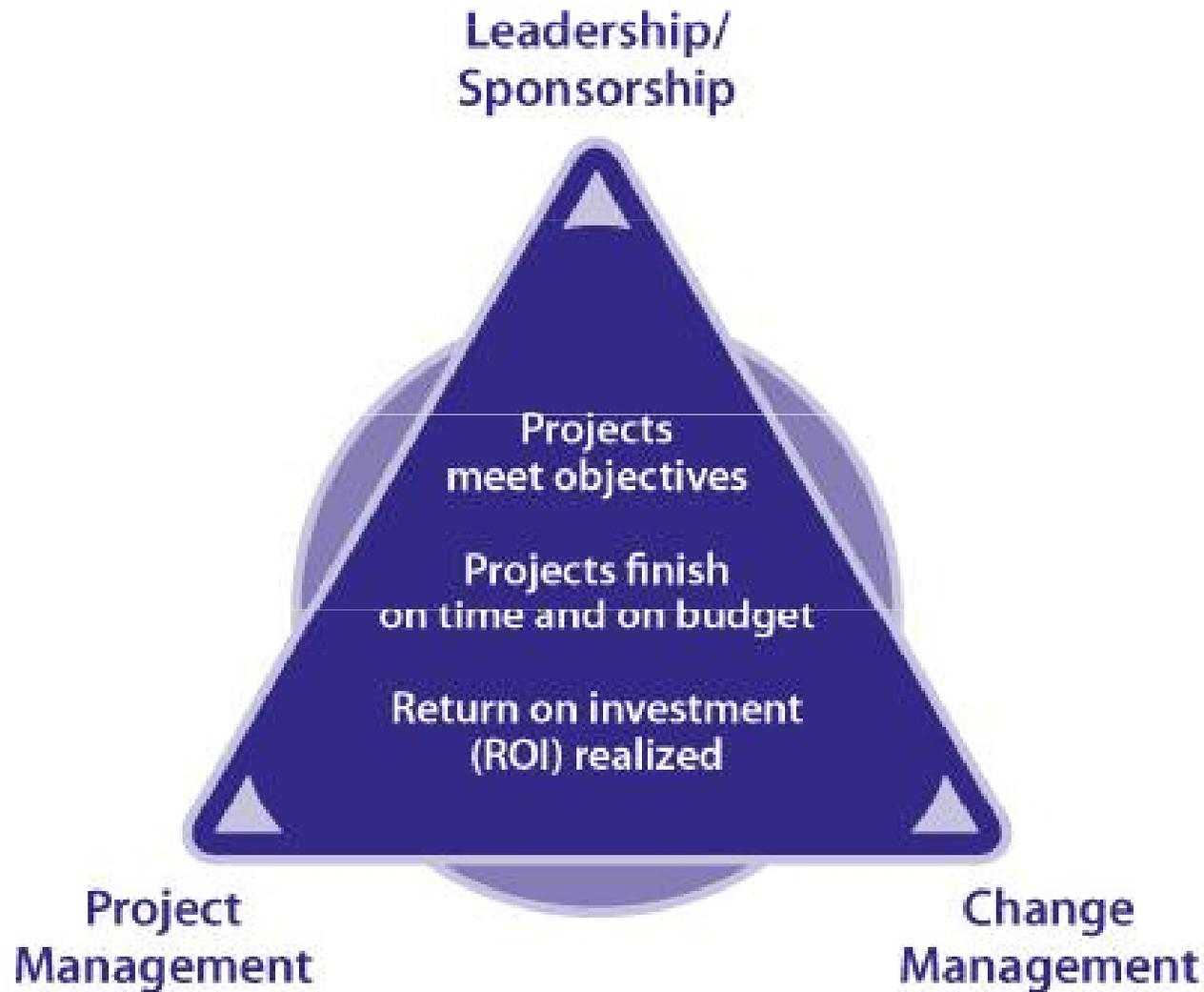
QUALCOMM Incorporated



IBM Cognos Enterprise Planning

Agenda

- 1. Change Management – *Definition and Concepts***
- 2. Training as part of Change Management**
- 3. People, Process, Platform – Training Methodology**
Lessons Learned, Pitfalls Avoided, ROI
- 4. Conclusion and Recommendations**



The Prosci Project Change Triangle (PCT)

Change Management is NOT:

- **Procedural management of project timeline**
- **Project Change Request forms**
- **A “training issue”**
- **A one-time communication or meeting**
- **A motivational speech instructing you to *like* the change, because it’s your job to do so.**



Change Management IS:

- **Set of processes, tools, and practices to manage the people side of the implementation**
- **Bridge between implementing the solution and ultimately realizing the benefits of the change**
- **Repeatable, systematic**
- **Directly impacts User adoption and ROI**
- **Individual and organizational in perspective**



What is Change Management?

Change Management IS:

Set of processes, tools, and practices to manage people side of implementation

Process:

- Transition from current state to future state
- Minimize productivity loss during change
- Maximize speed of adoption of change/new state

Tools:

- Sponsor roadmaps
- Comm Plan as part of project deliverable
- Coaching
- Training



KISS...

**Accurate Processes + Robust Tools
+ User Adoption = Project Success**

**Accurate Processes + Robust tools
– User adoption = Project Failure**



“Making Change Work”, IBM Corp, May 2008

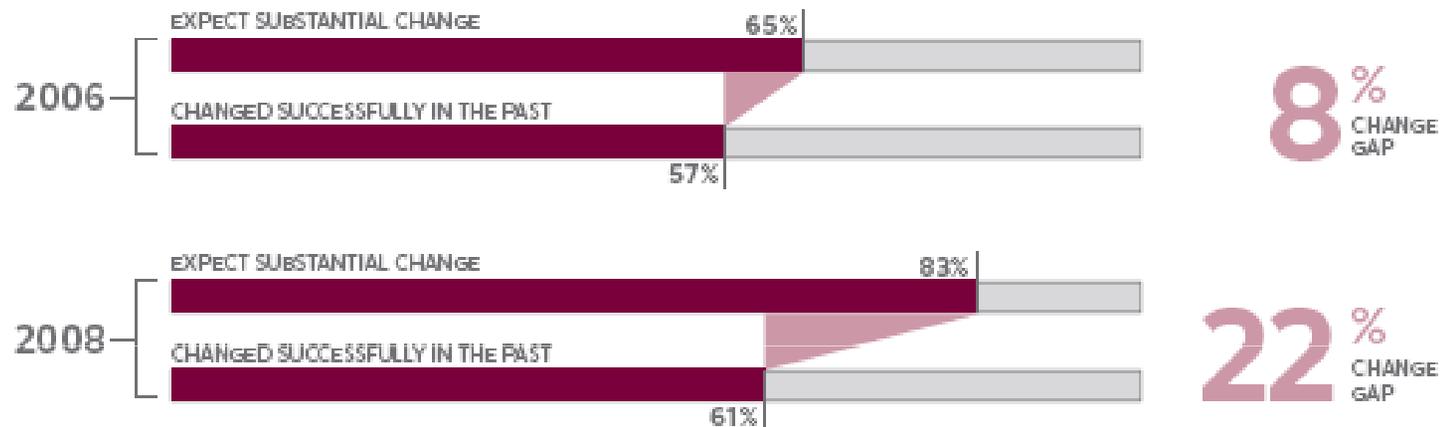
- 8:10 CEOs anticipate substantial or very substantial change over the next 3 years.
- Those same CEO's rate their ability to manage change 22 percent **lower** than their expected need to manage change.

“Making Change Work”, IBM Corp, May 2008

The “change gap” has nearly tripled since 2006

FIGURE 2 THE CHANGE GAP

The gap between the expectation of change and an organization’s history of managing it is growing.



Major Change Challenges...

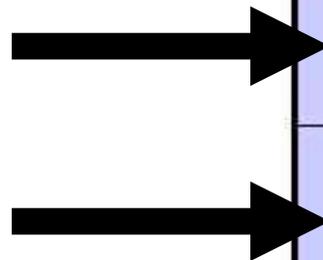
FIGURE 6 MAJOR CHANGE CHALLENGES

The most significant challenges when implementing change projects are people-oriented – topping the list are *changing mindsets* and *corporate culture*.

■ *Soft Factors* ■ *Hard Factors*

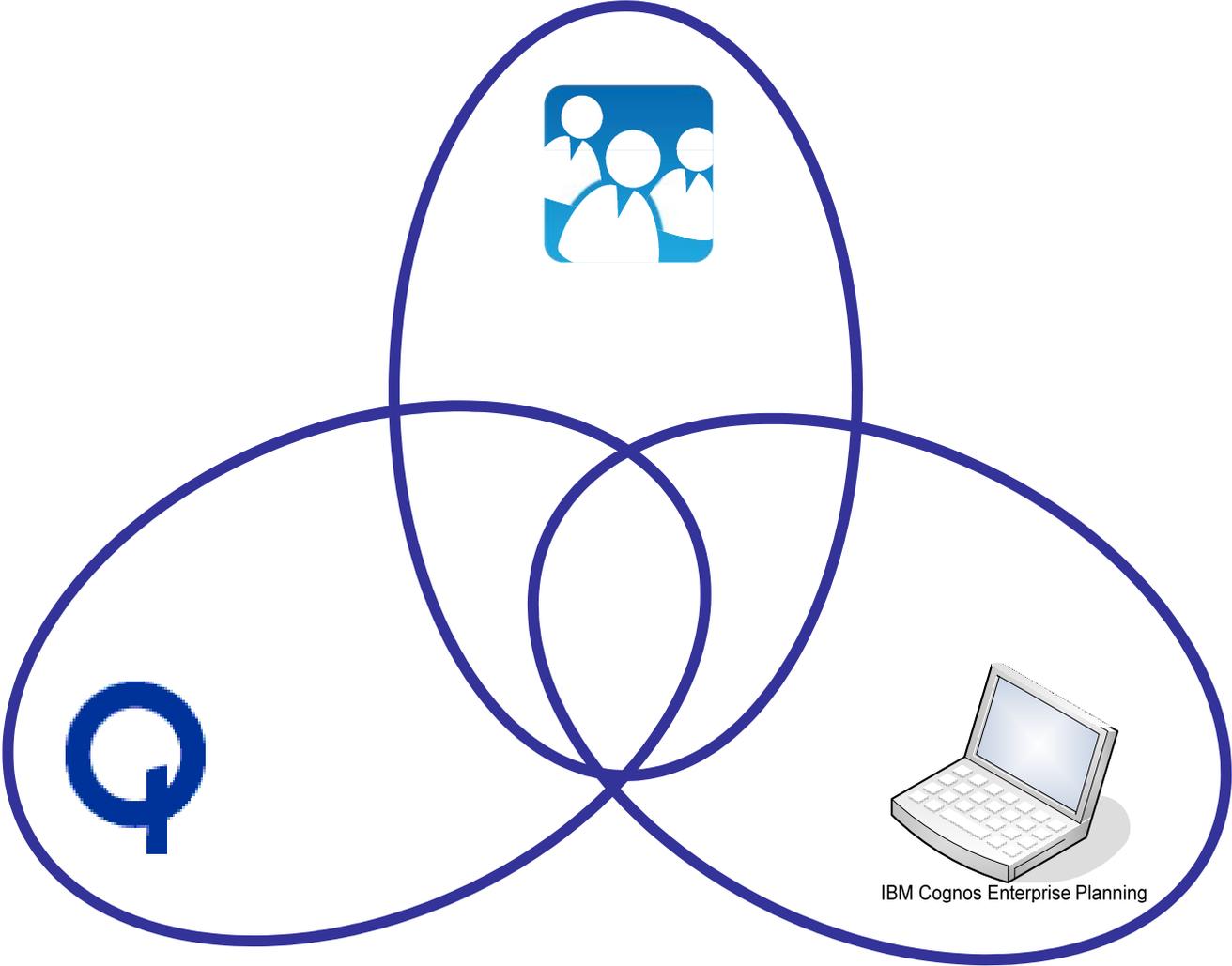


Prosci's ADKAR...



A	Awareness of the need for change	<ul style="list-style-type: none"> Management communications Customer input Marketplace changes Ready-access to information
D	Desire to participate and support the change	<ul style="list-style-type: none"> Fear of job loss Discontent with current state Imminent negative consequence Enhanced job security Affiliation and sense of belonging Career advancement Acquisition of power or position Incentive or compensation Trust and respect for leadership Hope in future state
K	Knowledge on how to change	<ul style="list-style-type: none"> Training and education Information access Examples and role models
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R	Reinforcement to sustain the change	<ul style="list-style-type: none"> Incentives and rewards Compensation changes Celebrations Personal recognition

People, Process, and Platform



IBM Cognos Enterprise Planning

Headcount, Labor, Overhead & Project Forecasting and Reporting Implementation

People

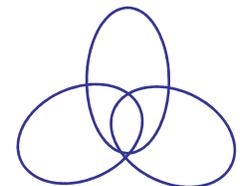
Financial Analysts located globally in 13 different business units

Process

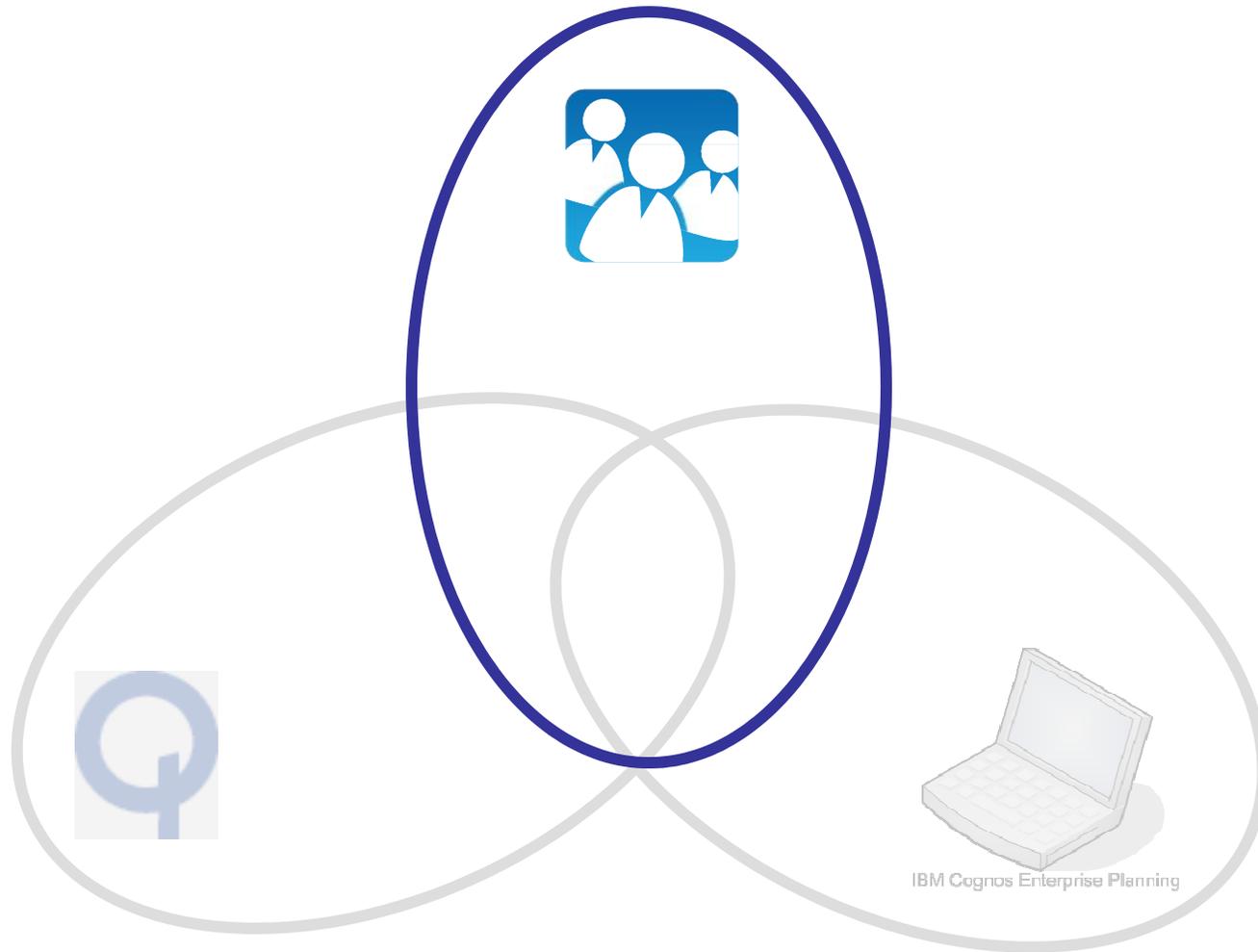
Need to build consistency where possible, and flexibility where necessary

Platform

Transition from IBM Cognos Finance and spreadsheets to IBM Cognos Enterprise Planning and IBM Cognos Business Intelligence



People, Process, and Platform



The number one obstacle to success for major change projects is employee resistance and the ineffective management of the people side of change.

(Prosci's "Best Practices in Change Management", 2007)

Who are the **People** in a Transformational change?

The Sponsors

The Managers

The Project Teams

The User Group ←



The People – User Group

13 Businesses

144 World-wide Locations

74 US Locations

Entrepreneurial Business Culture

Diverse Location Culture

Support for Finance Rotation Program



Change Management & Training Strategy

1. On-Demand Training

- eLearning
- User Guides
- Quick Cards
- Wiki with FAQs from Familiarization, UAT, Training Sessions and Support Calls



Change Management & Training Strategy

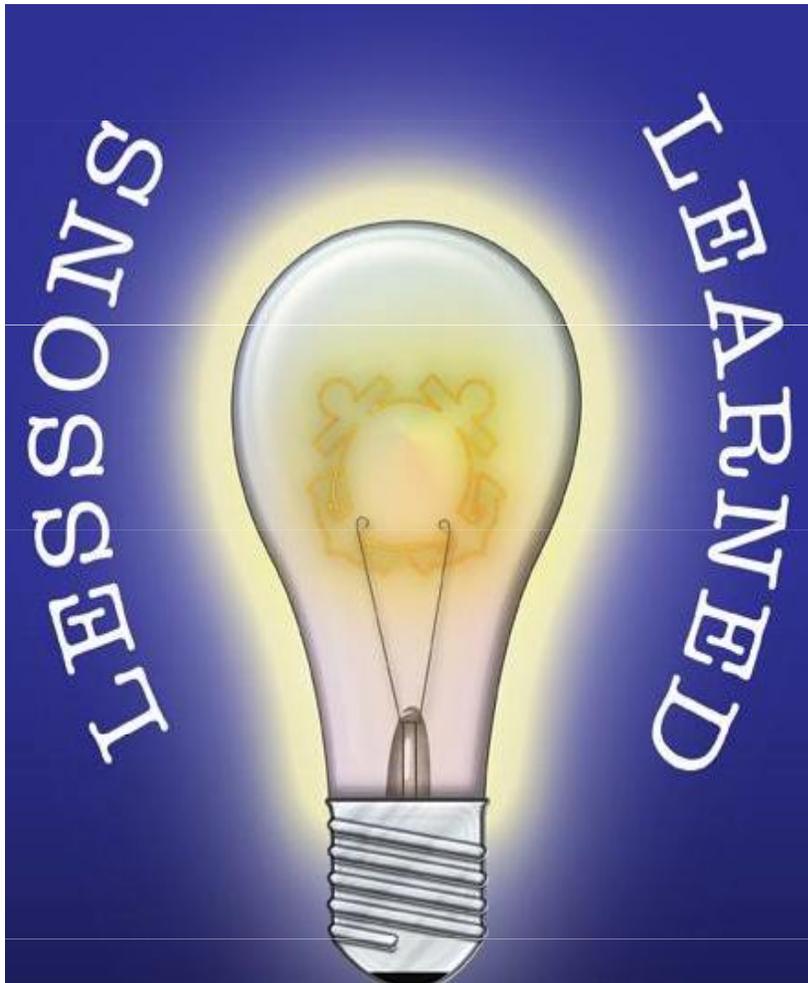
2. Preview Training Items early, often for feedback

- Business Advisory Team (BAT) reviews training
- Use Training Outline at Familiarization Sessions
- User Acceptance Test with Detailed Training Component

3. Measure the People aspect of Training through ADKAR Surveys and Training Effectiveness Surveys

- Measurement at UAT and Training and adjusting course based on outcomes. PULSE POINTS!





- ***Users are creative***
 - When left to themselves, they will find a way to use the tools
- ***Training needs constant reinforcement***
 - Drives consistent processes
 - New Users given the official message





- ***Lack of flexibility in Training program***
 - Early assessment through Familiarization, BAT Review, UAT walk through
- ***Lack of assessment of how the people are responding to the change***
 - Surveys give clues to how Users are responding – check in with the People!
 - Allows for change in strategy and addition of new training elements

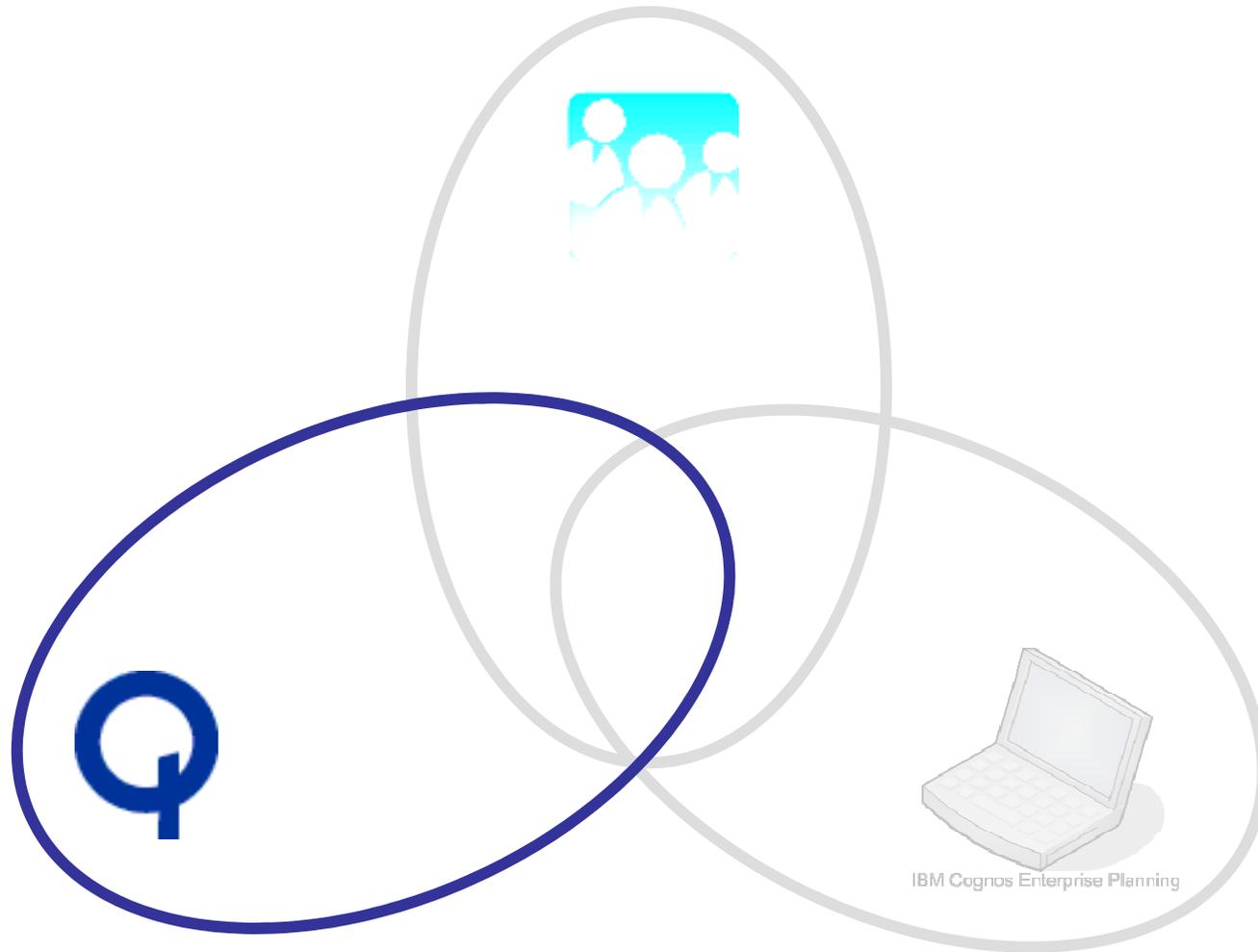


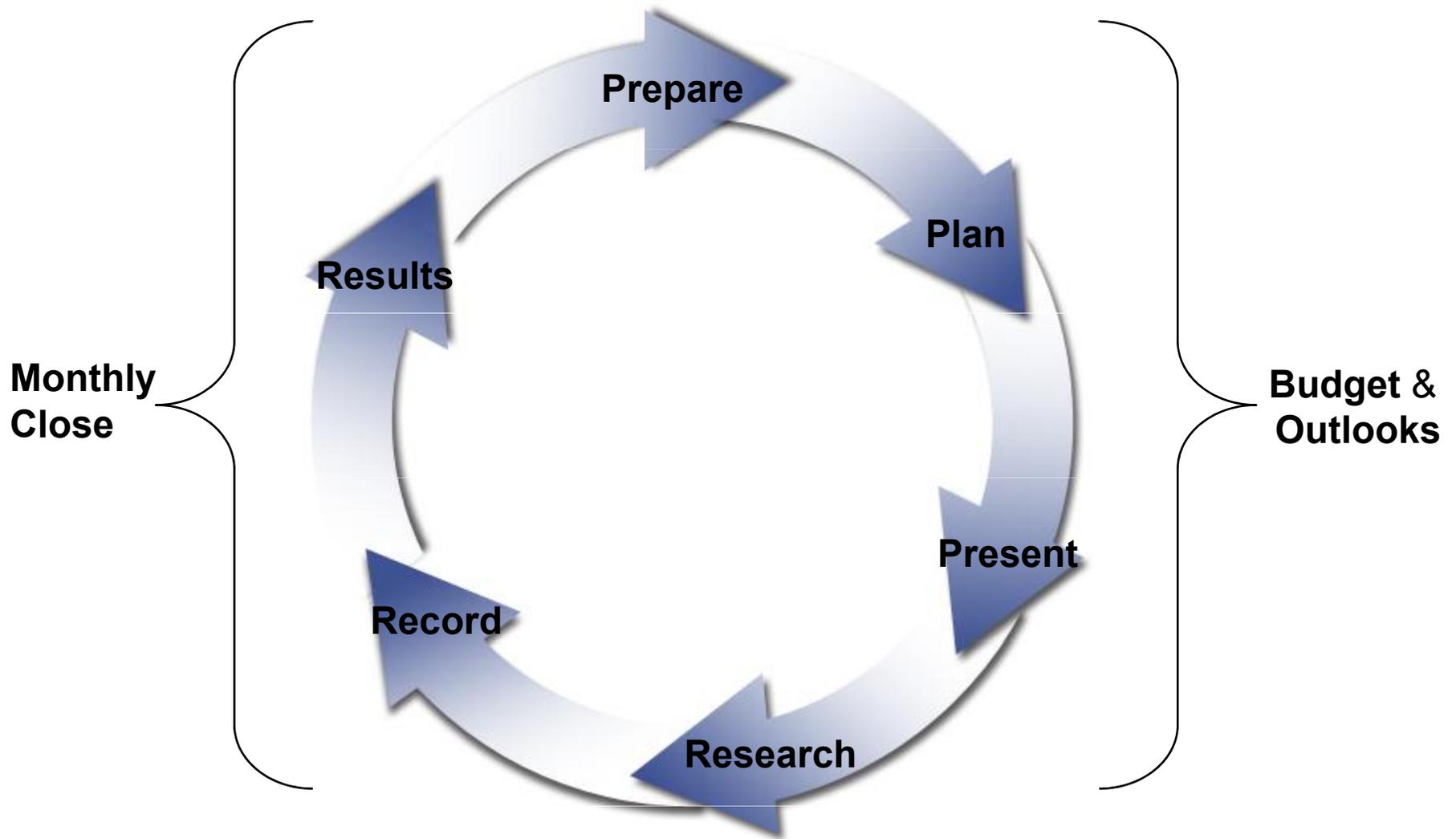
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People, Process, and Platform





- ✓ **13 Business Units drives 13 Business Processes**
- ✓ **Drive to “Best Practices” indicates a centralized approach**
- ✓ **Entrepreneurial Culture and Local Efficiency drives flexibility**
- ✓ **Improvements to current process to drive accuracy and efficiency**



Change Management & Training Strategy

1. Training on “Why”

- Models allow for complex customized decisions
- At every process decision point provide a “Why”
- Steps in Training:
 - A. Show the Process
 - B. Show the “Why”
 - C. Show the “What”



I. Commitments

- A. Enter new Commitments purchased from outside vendors
- B. Plan the placement of new self-constructed Assets (CIP) into service

II. Acquisitions

- A. Review already committed Assets to make sure Acquisition dates are accurate
- B. Review planned Acquisitions from previous Outlook and adjust as necessary

III. Depreciation

- A. Review Existing Asset Depreciation (EAD)
- B. Make manual adjustments for Assets not in ORACLE Fixed Assets

IV. Review Forecast

Change Management & Training Strategy

2. Central Source of Truth

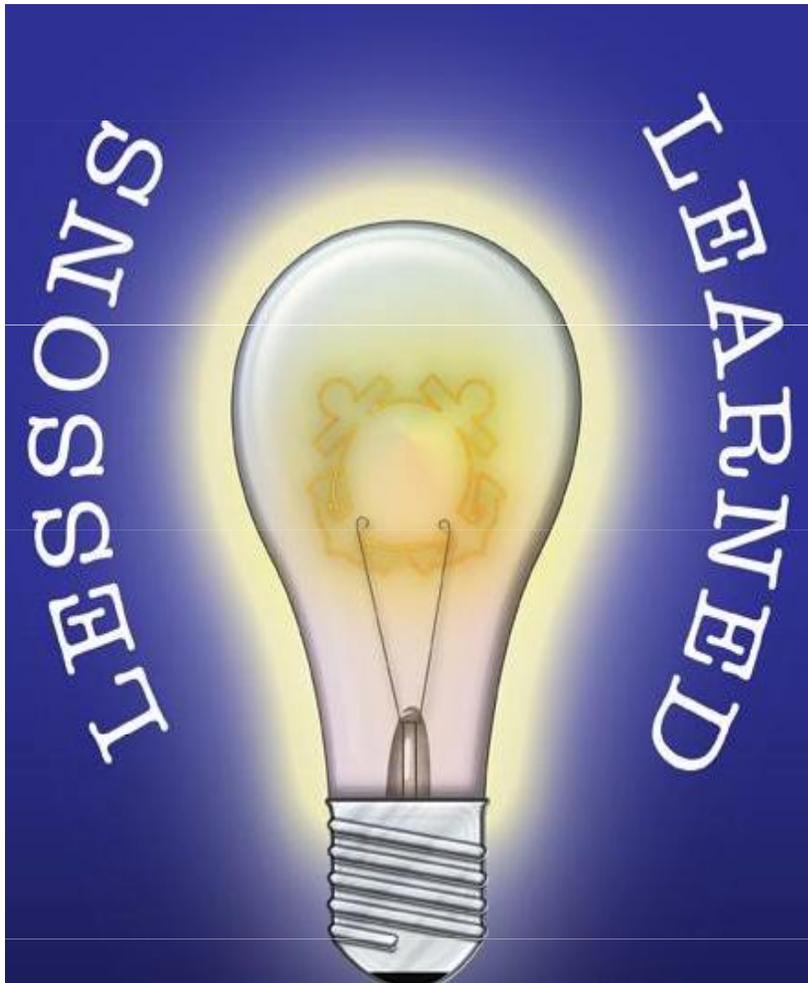
3. Preview Training Items early and often for feedback

- User Acceptance Test with Detailed Training Component
- Ensure Users understand the “Why” when completing UAT for better feedback

4. Enhanced User Items

- Quick Cards - Detailed Report descriptions
- Wiki - Excel mockup of complex features
- FAQ





- *Users who didn't develop process may be unaware of their own processes*
- *Multiple Processes drive inefficiency*
- *Legacy knowledge is:*
 - At best, inefficient for day-to-day FA activities
 - At worst, incorrect, driving costly errors
 - Not sustainable in departmental turnovers





- *No more multiple sources of “Truth”*
- *Preventing Business deviation from central process*
- *Training by Bob*
 - Eliminate “Point & Click”
 - Select SME’s wisely
 - Seize the opportunity

How often do you get the entire User group’s undivided attention?

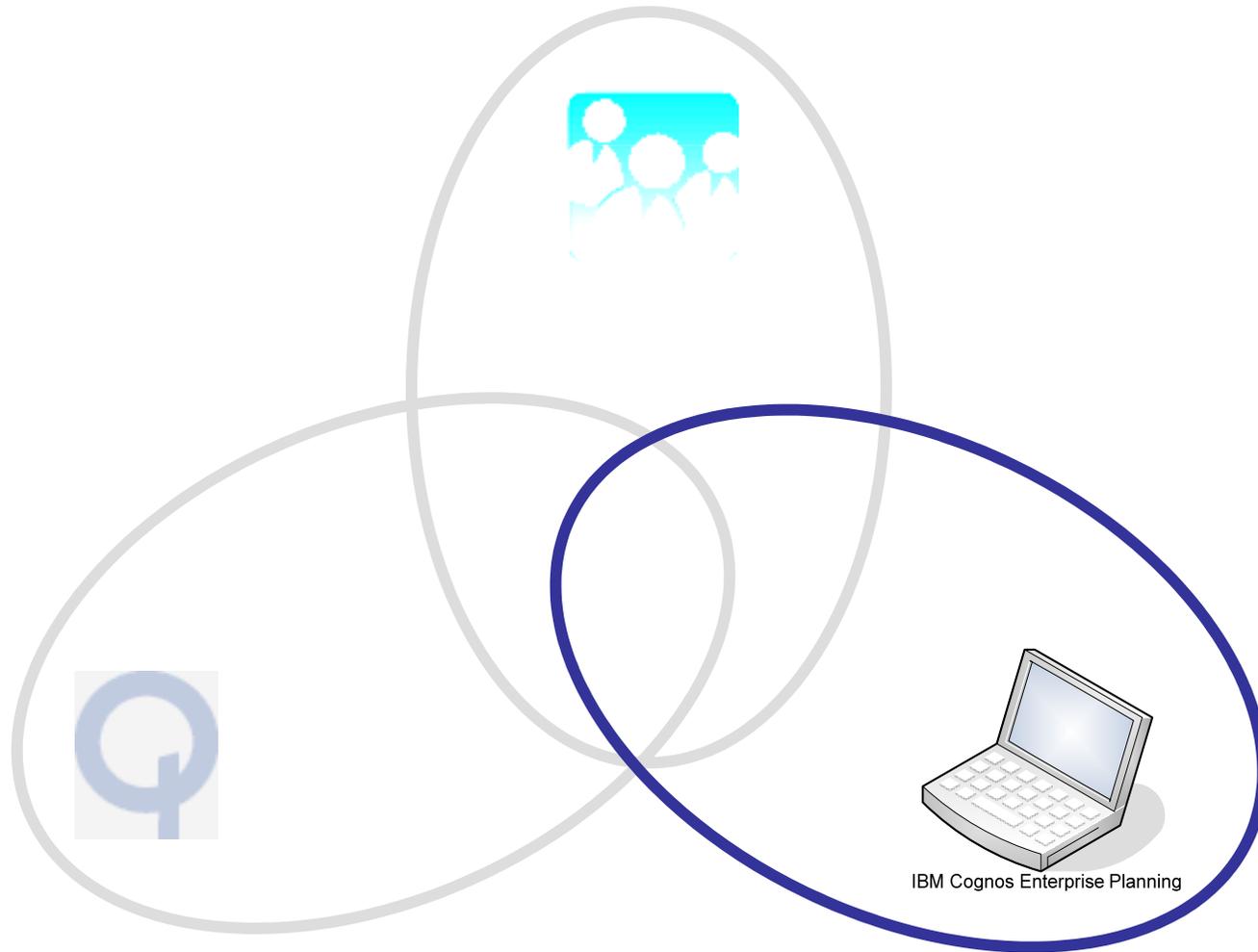


Change Management - Training

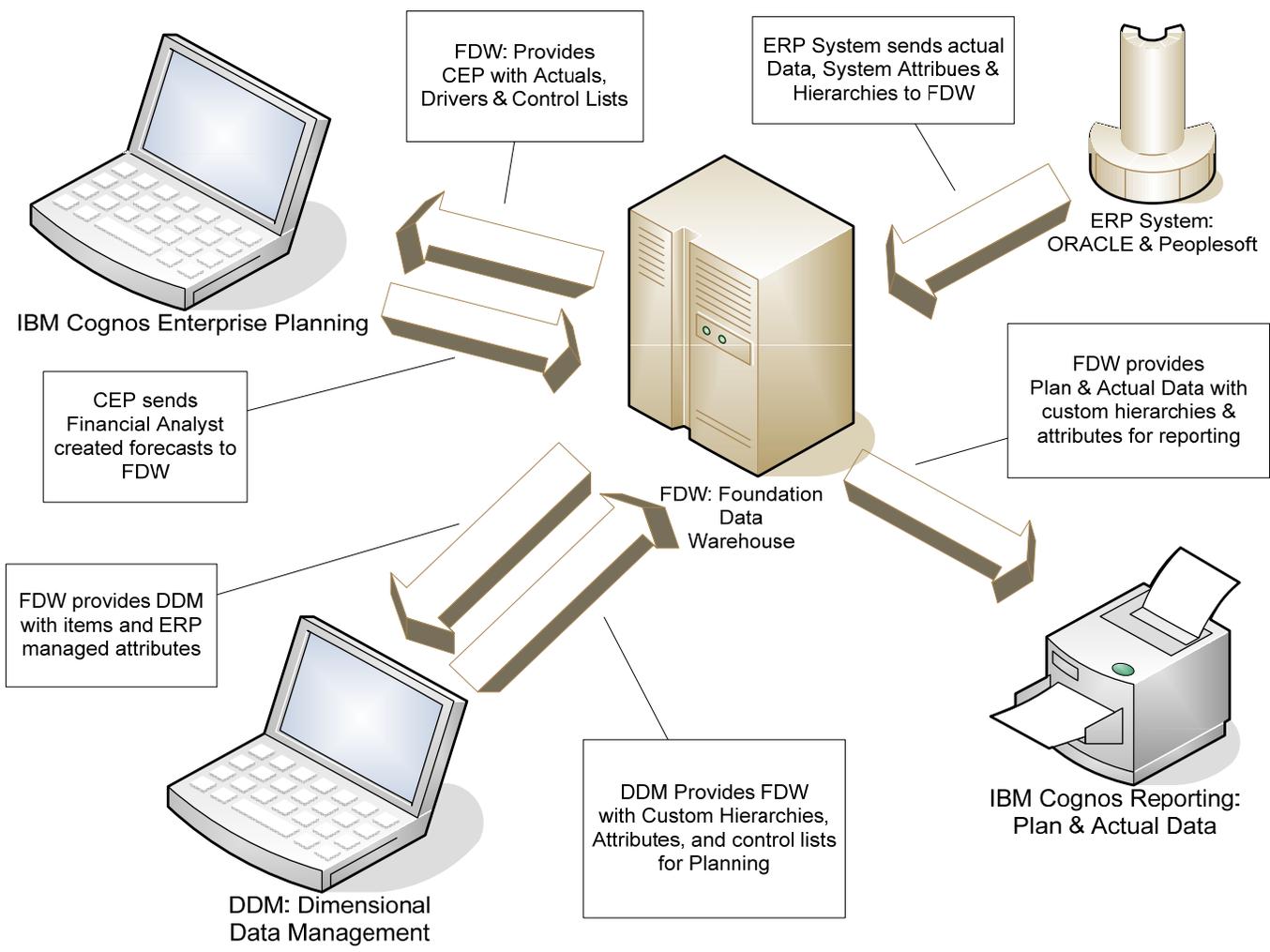
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People, Process, and Platform



Financial Planning & Reporting Overview

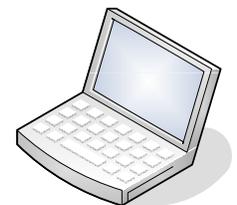


- **Transition from IBM Cognos Finance**
 - Hundreds of customized CF reports, Excel spreadsheets
- **Move to IBM Cognos Planning 8.3 with DDM**
- **Move to IBM Cognos Reporting Tools 8.3**
 - Analysis Studio
 - Standard Reporting

User Impact...

Planning & Reporting are not in the same tool

Customized management reports need to be changed



Change Management & Training Strategy

1. Don't Forget to teach the Tool

- Basic Navigation as a critical component; don't assume they know simple things
- Quick cards that explain icons, shortcuts
- Integrated training environment for hands on experience
- Mock data that doesn't distract and remains consistent



Change Management & Training Strategy

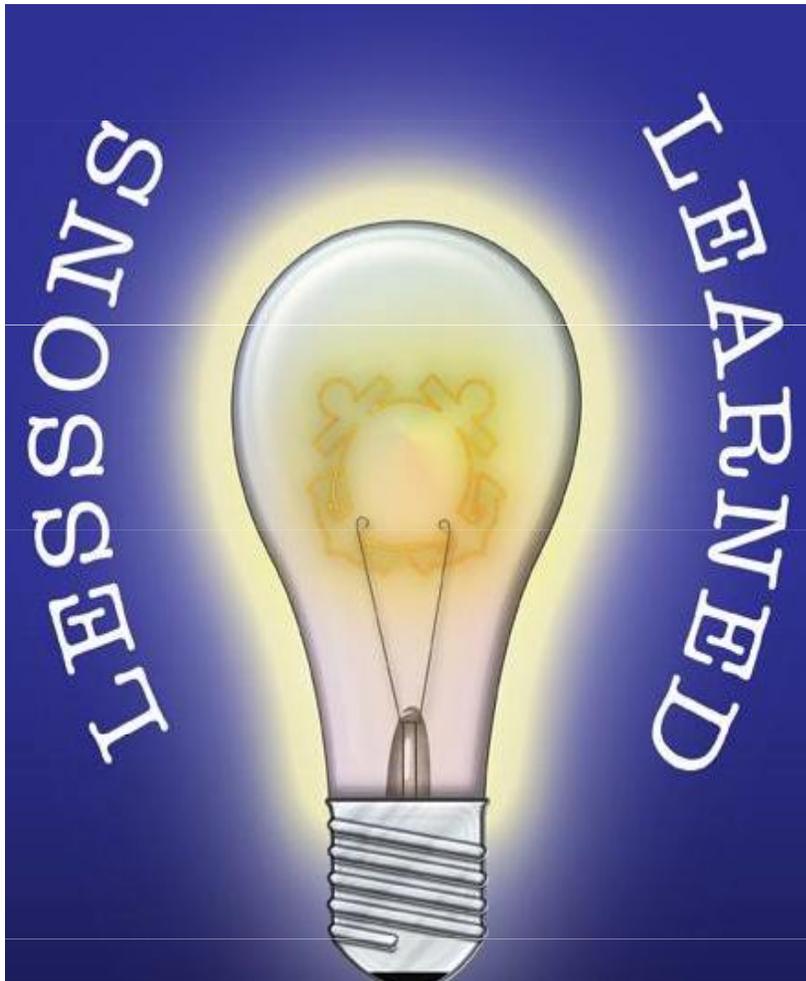
2. Survey the People

- Get user feedback on the Training
- Adjust components

3. Monitor Questions

- Track questions
- Create FAQs
- Adjust Training for missed information





- ***Legacy Tool comfort can drive User confusion, frustration in new Tool***
 - Moving from an integrated to separate platform drives users to ask “where’s my reporting?”
 - Powerplay vs. AS
- ***Use of TST or PRD data in previous training sessions hindered tool comprehension***





- *Intuitive is what you know*

- Don't expect users to "get it" even if they've used the tool.

(e.g., Save icon)

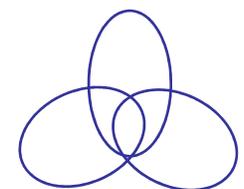
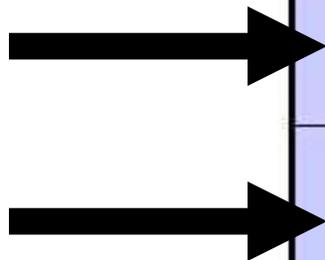
- Users have 5-10% of time to devote to understanding tool while IT is 100%

- Avoid "Tool should be so easy that we don't need to train it!"

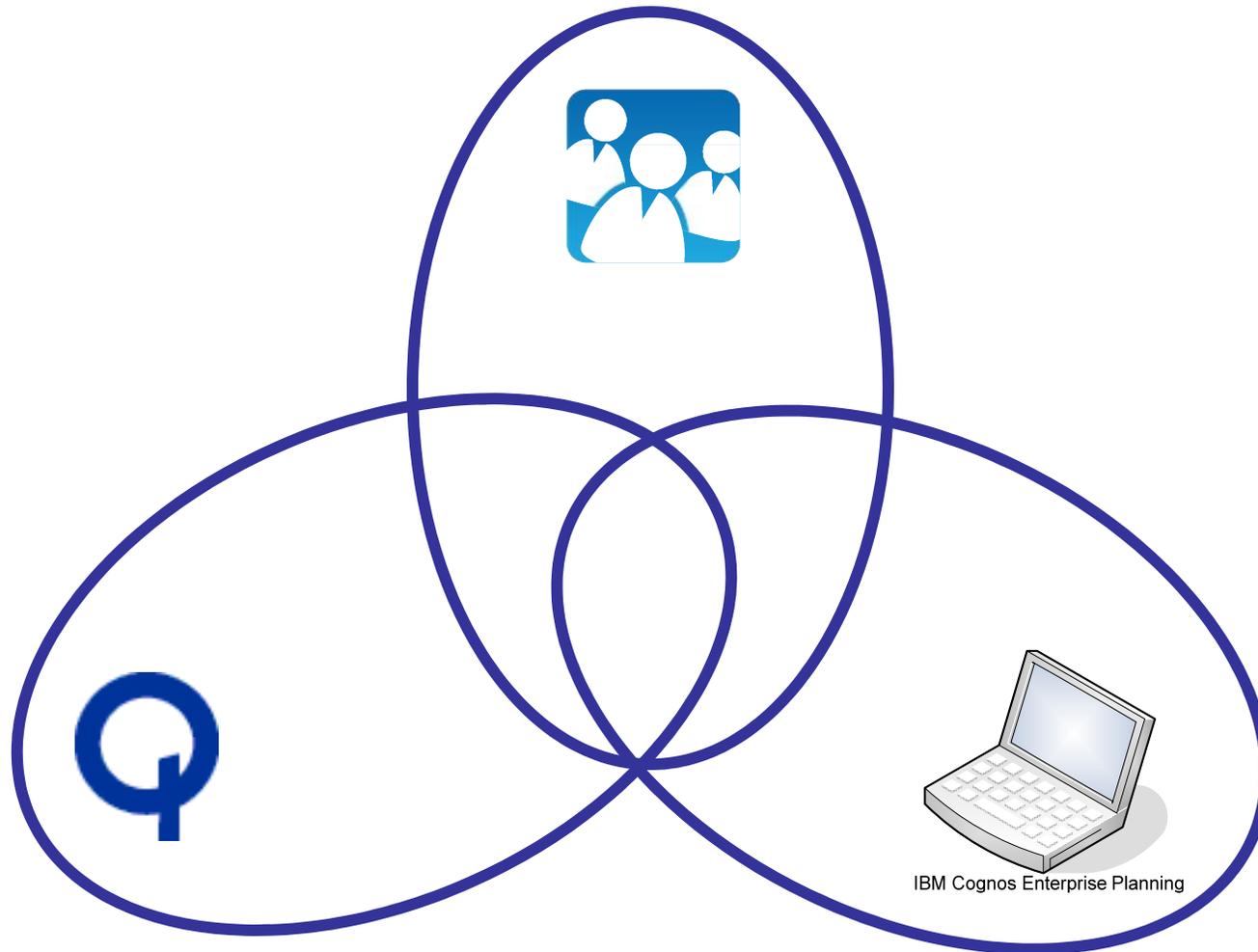


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People, Process, and Platform - *Integrated Training*



IBM Cognos Enterprise Planning

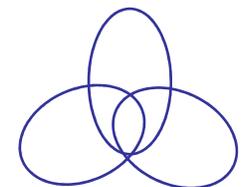


- **Costs**

- Change Management
- Training
- INVESTMENT!

- **Benefits**

- Efficiency
- Adoption
- People Value





Survey Results

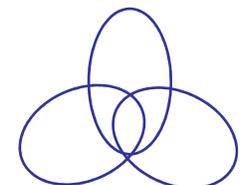
- 90%+ positive response to 8 of 9 questions surveyed (80% + all)

What did you like best?

- “The detailed explanations and focus on our specific process”
- “The training manuals and examples of how you would use drivers/profiles”

Other comments:

- “Very helpful examples demonstrating how the FA’s would actually use [the] module and in what instance”
- “Awesome – better than any other IT-type training I’ve ever received in the last 12 years here”





Measuring the Benefits

Financial Analyst Cost:

– \$125K per Year

– \$1 per minute

Example:

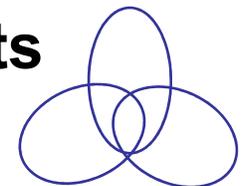
1 hour inefficiency

Opportunities/Cycle: 1000

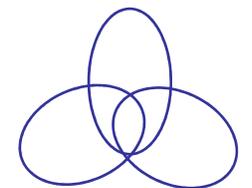
(250 Analysts @ 4 times)

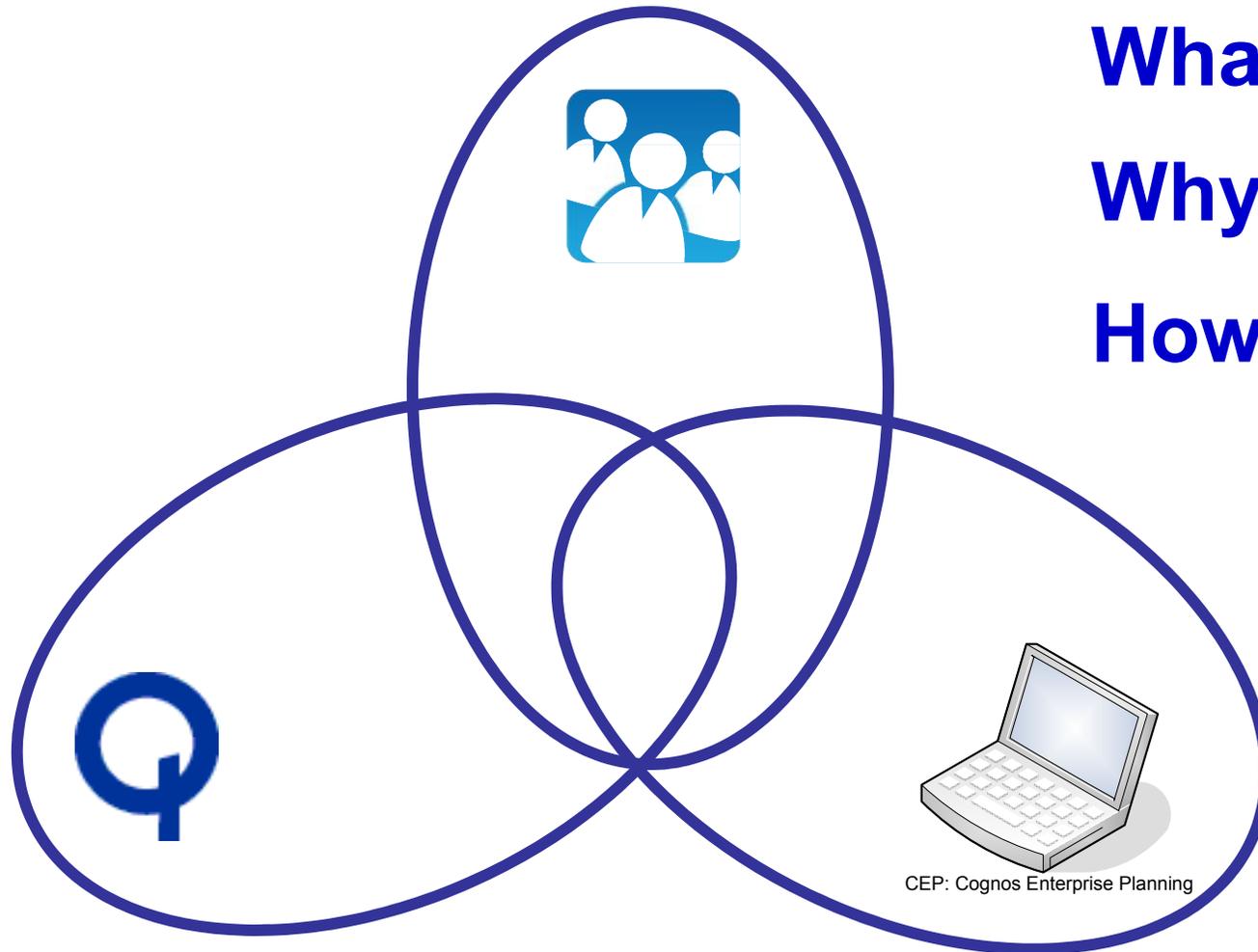
Cycles/Year: 11

= \$660K or 5 Analysts



Sample eLearning





What?

Why?

How?

Recommendations

- ***Early involvement of Change Management and Training***
 - Plan the checkpoints, be flexible with the actual path
- ***Take the pulse of the Users often***
 - Surveys, FAQ, FAM sessions, 1:1 calls, meetings
- ***Integrated Training approach***
 - Conducted by Business
 - Assisted by IT
 - Visibly/actively supported by Executives
- ***Dedicated Training Environment or Platform***
- ***Hard deliverables begin after development lock down***

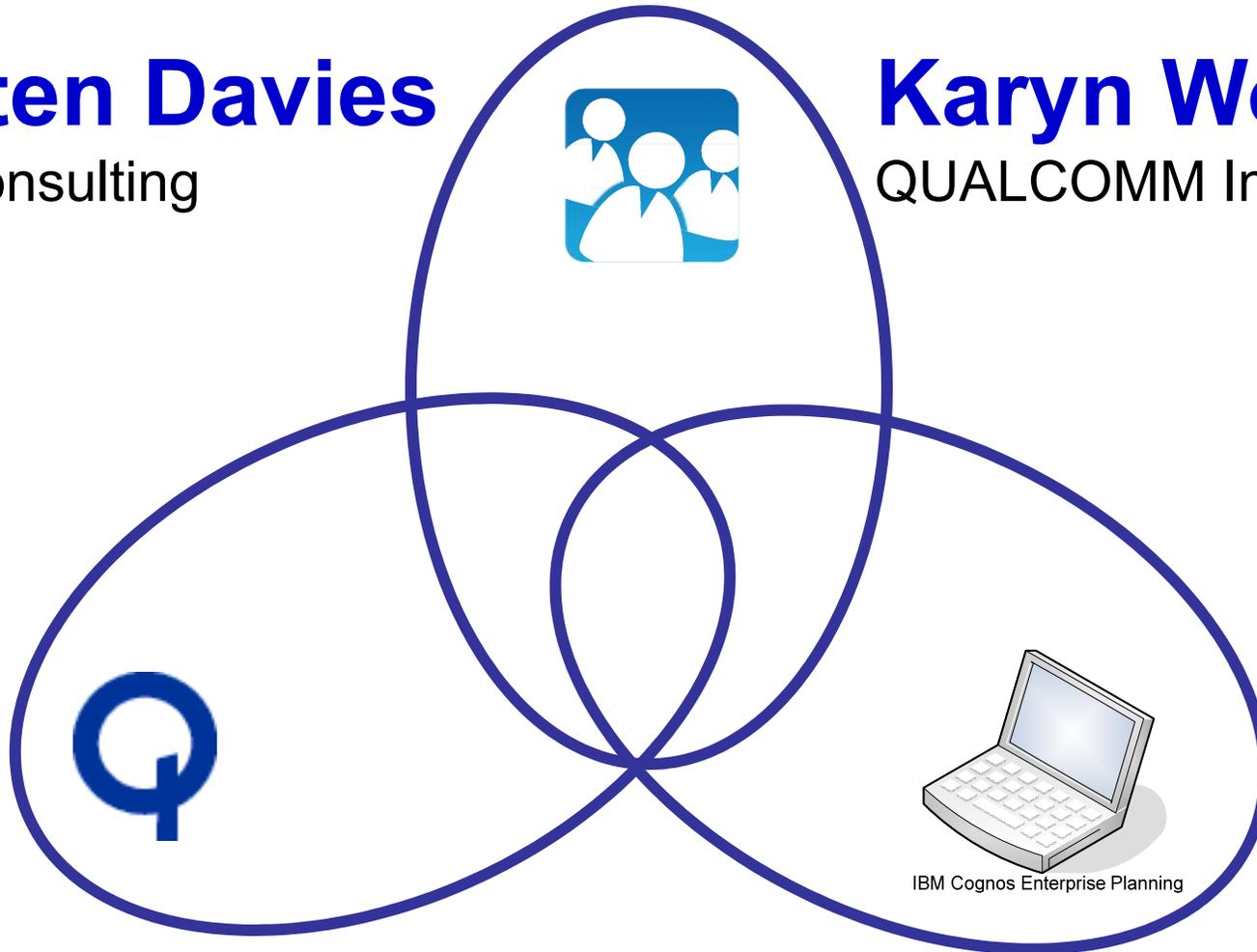
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