Prosci Webinar: Prosci Change Scorecard

Prosci Change Management Webinar

Prosci Change Scorecard

Prosci’s Mission
To help individuals and organizations build their own change management competencies through development and delivery of research-based, holistic, and easy-to-use tools and methodologies.

Our Principles:
• Research-based
• Holistic
• Easy-to-use

Our Resources:
• Published products and tools
• Web-based tools and applications
• Face-to-face training
• Train-the-Trainer

Prosci by the #s:
8 Longitudinal studies
17 Years of research
80% Fortune 100 companies
4500+ Research participants
30,000+ Certified practitioners
80,000+ Community members

Contact Prosci:
Telephone: +1-970-203-9332
Email: solutions@prosci.com
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Prosci® Webinars
• Educational
• Thought provoking
• Insights into new development

• New ideas, phraseology, language, and frameworks
• Give you at least an hour per week to think about change management

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If you don't know where you are going, you might wind up someplace else.

Yogi Berra
Definition of Goals and Objectives Drives Results

= exceeded objectives  = met objectives

Poorly Defined Goals and Objectives  Adequately Defined  Well Defined  Very Well Defined

Just because it is common sense does not mean it is common practice!

Will Rogers
### Why Are We Here?

<table>
<thead>
<tr>
<th>Requirements</th>
<th>→</th>
<th>Results</th>
</tr>
</thead>
<tbody>
<tr>
<td>Outputs</td>
<td>→</td>
<td>Outcomes</td>
</tr>
<tr>
<td>Specifications</td>
<td>→</td>
<td>Sustainment</td>
</tr>
<tr>
<td>Installation</td>
<td>→</td>
<td>Realization</td>
</tr>
<tr>
<td>Solutions</td>
<td>→</td>
<td>Benefits</td>
</tr>
</tbody>
</table>

### Prosci Change Scorecard

<table>
<thead>
<tr>
<th>Organizational Performance</th>
<th>...in order to capture the expected benefits and objectives</th>
</tr>
</thead>
<tbody>
<tr>
<td>Individual Performance</td>
<td>Support and catalyze individual employee adoption and usage</td>
</tr>
<tr>
<td>Change Mgmt Performance</td>
<td>...by applying effective change management in a structure, intentional way</td>
</tr>
</tbody>
</table>
Prosci Change Scorecard

<table>
<thead>
<tr>
<th></th>
<th>Early</th>
<th>Mid</th>
<th>Late</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Organizational</strong></td>
<td><strong>Org Readiness</strong></td>
<td><strong>Progress</strong></td>
<td><strong>Results</strong></td>
</tr>
<tr>
<td><strong>Performance</strong></td>
<td>and Change Requisites</td>
<td>to Plan</td>
<td>and Outcomes</td>
</tr>
<tr>
<td><strong>Individual</strong></td>
<td><strong>Individual</strong></td>
<td><strong>Engagement,</strong></td>
<td><strong>Usage and</strong></td>
</tr>
<tr>
<td><strong>Performance</strong></td>
<td><strong>Readiness</strong></td>
<td><strong>Participation,</strong></td>
<td><strong>Performance</strong></td>
</tr>
<tr>
<td><strong>Change Mgmt</strong></td>
<td><strong>Preparing:</strong></td>
<td><strong>Managing:</strong></td>
<td><strong>Reinforcing:</strong></td>
</tr>
<tr>
<td><strong>Performance</strong></td>
<td><strong>Strategy and Plans</strong></td>
<td><strong>Implementation</strong></td>
<td><strong>Sustaining</strong></td>
</tr>
<tr>
<td></td>
<td></td>
<td><strong>Activities</strong></td>
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</tr>
</tbody>
</table>

Agenda:

Prosci Change Scorecard

<table>
<thead>
<tr>
<th></th>
<th>Organization**</th>
<th><strong>Performance</strong></th>
<th><strong>Performance</strong></th>
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<tbody>
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<td>and Outcomes</td>
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<td>Individual <strong>Readiness</strong></td>
<td>Engagement,**</td>
<td><strong>Usage and</strong></td>
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<td></td>
<td>Participation,**</td>
<td><strong>Performance</strong></td>
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<td>and Adoption</td>
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<td><strong>Activities</strong></td>
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**WHY**

**HOW**

**WHAT**
Projects are more successful with a clear definition of what defines success and how to drive it.

- What is the **value** of having a shared definition of success up front?
- What **challenges** have you experienced in scorecarding project success?
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**WHAT**
- Individual Performance
- Individual Readiness
- Engagement, Participation, and Adoption
- Usage and Performance
- Change Mgmt Performance
- Preparing: Strategy and Plans
- Managing: Implementation Activities
- Reinforcing: Sustaining Activities

**HOW**
- we capture the portion of project benefits that depend on employee adoption and usage

**WHY**
- we are changing

**Gartner BPM Summit**
- 90%
- 80%
- 75%
- 60%
- 50%
- 45%
- 40%
- 35%
- 30%
- 25%
- 20%

**Prosci Webinar**
- 100%
- 95%
- 90%
- 85%
- 80%
- 75%
- 70%
- 65%
- 60%
- 50%
A Quick Case Study

Organization: $20B financial services firm
Project: installation of new Customer Relationship Mgmt system
Approach: CM lead facilitates conversation with project team based on the framework to identify key metrics

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<th>Late</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Organizational Performance</strong></td>
<td>Adoption of a nimble tool; Mobile solution; Increased speed to market</td>
<td>Delivery methodology milestones met</td>
<td>Increase in revenue X%; Increase opportunity size Y%; Improve win rates Z%</td>
</tr>
<tr>
<td><strong>Individual Performance</strong></td>
<td>Readiness assessments; Participation of change agent network</td>
<td>Awareness surveys; Knowledge checks; Logins to system</td>
<td>Behavior change; User productivity increases</td>
</tr>
<tr>
<td><strong>Change Management Performance</strong></td>
<td>Change management staffing; Key stakeholder alignment</td>
<td>Communication tracking; Manager involvement; Training delivery tracking</td>
<td>Follow-up assessments; Implementation reviews; Change outcome reviews</td>
</tr>
</tbody>
</table>

Outcomes:

Big picture view
Co-created, shared vision of “success”
Reconciled various existing measures
Connected of dots that were not connecting
Executive: “Now, I get it. I understand what change management is doing.”
Connecting the Dots

Connect project mantra (that everyone could recite) to what the organization was actually going to get out of it

Connect tangible individual performance metrics to organizational benefits

Connect CM activities to successful individual transitions

Creating a Shared Definition of Success

Why are we changing? What does “done” mean? How do we define success?
Mobilize More People, Think Bigger, Focus on the Future – It All Starts Here!

Research-based

Multi-dimensional

Definition of success (outcomes and activities)
**New Measurement Questions**

Did you **measure the effectiveness** of your change management effort in support of the project?  
What metrics did you use?  

Did you measure whether the change was occurring at the **individual level**?  
What metrics did you use?  

Did you have to **report on** change management effectiveness of the project?  
To whom? What metrics did you use?  

How did you demonstrate the **value-add** of applying change management on the project?  

How did you measure the **overall outcome** of applying change management on the project?
Prosci Webinar: Prosci Change Scorecard
### Prosci Webinar: Prosci Change Scorecard

#### Organizational Performance

<table>
<thead>
<tr>
<th>WHAT</th>
<th>HOW</th>
<th>WHY</th>
</tr>
</thead>
<tbody>
<tr>
<td>Org Readiness and Change Requisites</td>
<td>Progress to Plan</td>
<td>Results and Outcomes</td>
</tr>
<tr>
<td>Benefit realization</td>
<td>Return on Investment (ROI)</td>
<td>Objectives set</td>
</tr>
<tr>
<td>Project success</td>
<td>Objectives met</td>
<td>Performance improvement</td>
</tr>
<tr>
<td>Progress to plan</td>
<td>Performance against deliverables</td>
<td>Adherence to schedule</td>
</tr>
<tr>
<td>Key Performance Indicators</td>
<td>Readiness (Change and Business)</td>
<td>Results and outcomes</td>
</tr>
</tbody>
</table>

#### Individual Performance

<table>
<thead>
<tr>
<th>WHAT</th>
<th>HOW</th>
<th>WHY</th>
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<tbody>
<tr>
<td>Individual Readiness</td>
<td>Engagement, Participation, and Adoption</td>
<td>Usage and Performance</td>
</tr>
<tr>
<td>Usage</td>
<td>Compliance</td>
<td>Adoption</td>
</tr>
<tr>
<td>Buy-in and commitment</td>
<td>Engagement</td>
<td>Proficiency</td>
</tr>
<tr>
<td>Participation</td>
<td>Awareness</td>
<td>Results and outcomes</td>
</tr>
<tr>
<td>Understanding</td>
<td>Readiness (Individual)</td>
<td></td>
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Prosci Change Measurement Framework
Three Levels x Three Timeframes

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<td><strong>Individual Performance</strong></td>
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<tr>
<td>Objectives set Readiness</td>
<td>Buy-in and commitment Awareness Understanding Readiness</td>
<td>Approach Resources Scaling and customizing</td>
</tr>
<tr>
<td>Progress to plan Deliverables met Schedule adherence KPIs</td>
<td>Adoption Engagement Participation</td>
<td>Activity completion Comm. completion Training completion</td>
</tr>
<tr>
<td>Benefit realization Project success Objectives met Performance improvement</td>
<td>Usage Compliance Proficiency</td>
<td>Activity effectiveness Compliance/usage audits Collection of feedback Sustainment activities</td>
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</tbody>
</table>

- Applying approach
- Dedicating resources
- Scaling and customizing

Activity completion
Activity effectiveness
Communication deliveries
Communication effectiveness
Training delivery/attendance
Training effectiveness
Sustainment activities
Collection of feedback
Compliance and usage audits
Results and outcomes
Prosci Change Scorecard

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<tbody>
<tr>
<td>Outcome</td>
<td>Outcome</td>
<td>Activity</td>
</tr>
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</table>

Change Scorecard Over Real Project Timeline

<table>
<thead>
<tr>
<th>Kickoff</th>
<th>Introduce to Impacted Employees (start Individual)</th>
<th>Go Live Ability for Individuals</th>
</tr>
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### What goes in each cell?

**Organizational Performance**

- Organizational Performance
- Organizational Readiness
- Change Management Performance
- Early
- Mid
- Late

**Individual Performance**

- Individual Readiness
- Engagement, Participation, and Adoption
- Usage and Performance

**Change Management Performance**

- Preparing: Strategy and Plans
- Managing: Implementation Activities
- Reinforcing: Sustaining Activities
- Early
- Mid
- Late

### Prosci Change Scorecard

Prosci Change Scorecard

- **Research-based**
- **Multi-dimensional**
- **Definition of success (outcomes and activities)**

Prosci Change Scorecard

- **Meet**
- **Implement**
- **Measure**
- **Track**

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Which Cells Should You Tackle in a Meeting?

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<th>Change Mgmt Performance</th>
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<td>Usage and Performance</td>
<td>Reinforcing: Sustaining Activities</td>
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</table>

It is not the answer that enlightens, but the question.

Eugène Ionesco
Prosci Webinar: Prosci Change Scorecard

Change Catalyzing Questions


Prosci Change Management Blueprint
Achieving Results By Catalyzing Individual Change

Why are we changing?

How Much depends on individual transitions?

Who has to do their jobs differently?

What can we do to drive and support individual transitions?
Why Are We Changing?

Organizational Benefits

- Revenue
- Costs
- Profits
- Efficiencies

Project Objectives

- Compliance
- Safety
- Process Excellence
- Customer Satisfaction

Future

Specific metrics and measurements for improvement

How work will be different after the change

Who has to “adopt and use”?

What does “adopt and use” mean?

Aspects of a person’s job you can impact

Location
Processes
Compensation
Systems
Performance reviews
Tools
Reporting structure
Critical behaviors
Mindset/Attitudes/Beliefs
Job roles

Connecting...

4 Change Catalyzing Questions

...to the Prosci Change Scorecard

What you have left to do...
Create and Finalize Your Scorecard

Objectives
Charter
Scope

Plan
Resources
Team

Deliverables
Milestones
KPIs

Budget
Schedule
Plan

Catalyzing:
Awareness
Desire
Knowledge
Ability
Reinforcement

Approach
Resources
Scaling

CM Strategy
CM Plans
Integration

Top Contributor
Alignment
Activity
Execution

Activity
Effectiveness
Feedback
Sustainment
Implementing Change Management
“Align Ability With Go Live”

<table>
<thead>
<tr>
<th>General Project Lifecycle</th>
<th>Major events</th>
</tr>
</thead>
<tbody>
<tr>
<td>Kick off</td>
<td>“Go Live”</td>
</tr>
<tr>
<td>Initiate</td>
<td></td>
</tr>
<tr>
<td>Plan</td>
<td></td>
</tr>
<tr>
<td>Design</td>
<td></td>
</tr>
<tr>
<td>Develop</td>
<td></td>
</tr>
<tr>
<td>Deploy</td>
<td></td>
</tr>
<tr>
<td>Prosci® ADKAR® Model</td>
<td></td>
</tr>
<tr>
<td>Prosci® 3-Phase Process</td>
<td></td>
</tr>
<tr>
<td>Organizational Change Mgmt Activities</td>
<td></td>
</tr>
</tbody>
</table>
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Measuring

It depends!

ADKAR Dashboard

Organizational Performance
- Dry Readiness and Change Requisites
- Progress to Plan
- Results and Outcomes

Individual Performance
- Individual Readiness
- Engagement, Participation, and Adoption
- Usage and Performance

Change Mgmt Performance
- Preparing Strategy and Plans
- Managing Implementation Activities
- Reinforcing Sustaining Activities

eBest Practice Audit

Tracking Progress on Scorecard Definition

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However beautiful the strategy, you should occasionally look at the results.

Winston Churchill
Prosci Solution

Delivering organizational results by catalyzing individual transitions

http://www.prosci.com
solutions@prosci.com

Build individual change competencies
Apply change management on initiatives
Embed organizational change capability

Join Prosci’s Tim Creasey in Minneapolis
MNCMN Professional Development Days
Feb 18 & 19, 2016

Email solutions@prosci.com or visit www.mncmn.org for more information or to register

Feb 18:
2-4:30 Roundtable Forum: A Roadmap for Building Organizational Change Management Capability
5-7 MNCMN Change Summit: Building Organizational Agility Through Enterprise CM

Feb 19:
AM Advanced Workshop: How to Write a Business Case for Change Management
PM Advanced Workshop: How to Create Your Change Scorecard