Performance MATTERS

DRIVING SYSTEMS ADOPTION IN AN AGILE AGE

TiER1 PERFORMANCE

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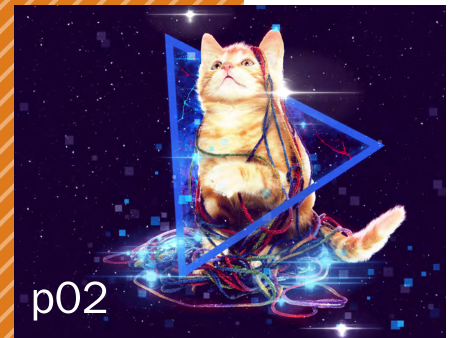

MESSAGE TO OUR *Readers*

We live in a digital world. Technology fuels everything we do, from what we deliver to our customers to how we deliver it. To some extent, **every company is now a technology company;** those embracing that fact are ahead of the curve.

Technologies are more pervasive than ever. There is an app, tool, or system for nearly every aspect of our work. Every strategic plan, every initiative, every growth goal, every productivity improvement—all are facilitated by technology. Yet, whether these technologies (and the growing volumes of data they produce) create value depends on the people who use them. Simply having better systems and data is not enough. They must be integrated into the work environment in ways that can be sufficiently supported and adopted to deliver business value.

Our capacity to adopt systems, adapt to new tools, or access and analyze new data impacts our ability to be productive and add value in the modern work world. As leaders of technology, our capacity to help others do these things has become central to our ability to lead the business itself. Doing this requires a deep understanding of people and what drives their behavior at work. **Without people, technology is just a really big expense.** With people—specifically, fully engaged, prepared, and aligned people who can use technology to innovate and connect and build—technology is a game changer. Underscoring every investment in technology is an investment in people. As people learn, grow, and become more productive, the technology takes root, and the business sees real returns.

In this edition of Performance Matters, we explore multiple dimensions of organizational and behavioral change that drive adoption of technology, including:

- Different types of systems, implementation strategies, and their unique challenges. (p.2-15)
- New ways of working and sustaining adoption in an agile environment. (p.16-21)
- Key project roles and their influence on driving systems adoption. (p. 22-29)

We hope you enjoy and, as always, invite your feedback and thoughts.

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People Readiness Matters

THE COMMON THREAD OF SUCCESS FOR ANY SYSTEM IMPLEMENTATION IS PEOPLE.

by Abby Bolton

Despite the promise of new technology platforms, people can feel tangled up by change.

Too often, organizations focus disproportionately on getting the technology and process pillars right, while shortchanging the third pillar of any successful system implementation—people readiness. It won't really matter how efficient your systems or processes are, if your people aren't ready and able to work in the new ways required. Maybe that's why "75% of transformation efforts don't ultimately deliver the hoped-for results," as cited recently by the Harvard Business Review.

Preparing people for any large-scale organizational change, especially the integration of a new system into their daily routine, takes a careful threading of ongoing leadership and stakeholder engagement, intentional communication, thorough impact analysis, prepared Super User networks, role-based training, quantitative and qualitative evaluation, and other alignment activities—all through a human-centered frame.

It sounds like a lot, and it can be. To help you untangle this complex convergence, here are some key considerations and watch-outs to inform your next implementation.

Leadership Engagement

Involve senior leaders and management at all levels throughout implementation. Generally, end users believe, "If my leader doesn't care, why should I?" That's why it's critical to bring in influencers and decision-makers early in the timeline. Without the support and engagement of leaders, employees will experience misaligned priorities and won't give the change the focus it needs.

Spend focused time upfront to frame and discuss the business case clearly to secure buy-in. Be clear about the resources you need to be successful, and articulate the impacts of not getting those resources (some examples might be longer implementation time, lower quality, more issues, more help desk calls, longer hypercare, greater time-to-competence after Go Live, or productivity loss after Go Live).

Understand your influencers through a stakeholder analysis. Identify who needs to be aligned across business functions, and develop a cadence for gathering (and addressing) stakeholder input over time. Establishing this cadence will help position your initiative for success.

Don't underestimate the importance of the frontline leader as a change enabler. Frontline leaders have both the budgeting authority to provide necessary resources and tools, and the decision-making authority to remove barriers to change where needed. Position frontline managers as "change leaders" by engaging them regularly through their established channels, addressing concerns head on, and coaching them on how to actively guide their people toward new ways of working.

Change Communications

Create a strategy and plan for transparent and ongoing communication from project launch through post-Go Live. Change communication is about taking people on the (sometimes bumpy) journey to adopt change over time. The key is to be transparent. You don't have to have all the answers yet, but if you don't intentionally shape the narrative, the proverbial "watercooler" will.

Develop a compelling narrative for the change that is rooted in the story of WHY the change is needed. Once that's understood, leverage clear, concise messaging that's light on conventional "business speak." Develop key messaging to address the what, when, how, and who behind the change. Tailor supporting messages that will resonate with your audience and rally their hearts and minds behind the desired future state.

Use empathy to put yourself in the shoes of your audience. Consider not just end users but executives, managers, customers, vendors, application developers, project managers, and the larger project team (as the change team also often drives project team communication). Messaging should become increasingly more targeted and tactical as the project progresses and role-based change impacts are identified.

Leverage a variety of channels and content to effectively reach every audience. Create compelling stories and visuals that support clarity and retention of information while also cutting through the clutter. Arm managers with the tools to easily reinforce your message, such as talking points, graphics, or one-pagers. It's wise to confirm that cascaded communications are reaching those at all levels of the organization. Giving leaders and managers a "preview" of content before it is sent to their teams keeps them in the know and better prepared to address questions that may arise.

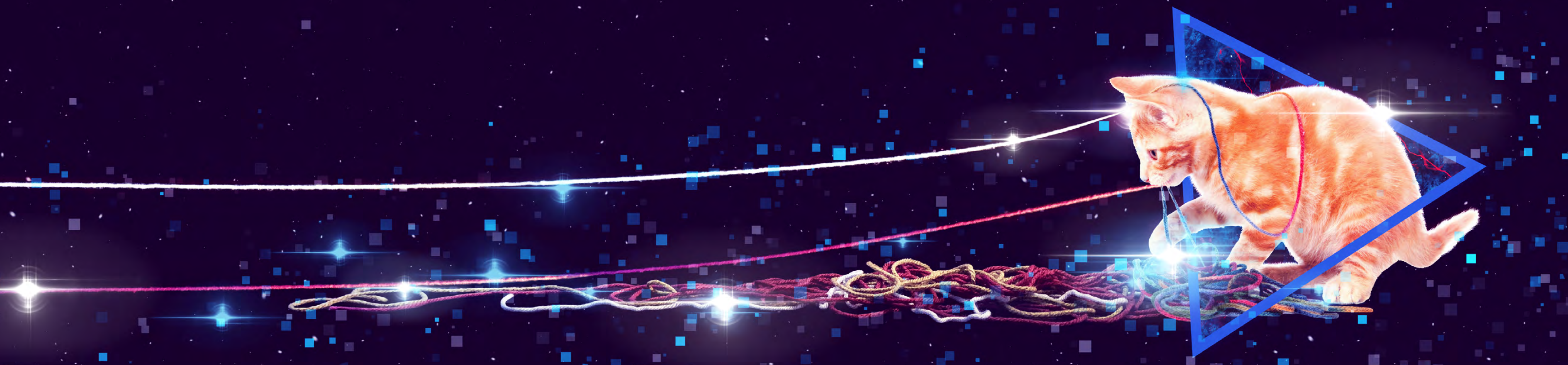
Impact Analysis

Document and articulate change impacts, then put that information to work. Identify the "today" versus "tomorrow" view of processes, behaviors, roles, terminology, workload shifts, etc. Armed with a set of change impacts, you can then communicate these changes in digestible ways with progressive detail to ensure understanding around what's changing, what tradeoffs are required to be successful, what is needed from specific end users, and how to be successful using the new system and processes.

Set the scene for successful training and overall adoption. People need time to work through what's coming. In advance of training, socialize critical information such as how things will look or feel different, so that people have space to ask questions and work through the natural emotions associated with change. They will then be able to focus on learning the "how" of the system and related processes during training and other learning events.

Help individuals understand how things are changing at different levels. This includes both the foundational, broad-scale, or cross-functional changes that the new system will necessitate (data integration, standardized data conventions, data accuracy, etc.), as well as the more detailed change impacts by function and role, as appropriate. Consider how interactions between various company functions will change (not just how the system will be different), along with implications for customers and suppliers.

Reiterate key changes and benefits several times through different channels. This could look like meeting presentations, one-on-one role discussions, reference materials, digital posters, training events—whatever works for your environment and end users. Remember that often it's less about "what's in it for me," and it's more about "what's in it for us" as an organization. Help employees connect the dots to see that, when the organization does well, everyone benefits.



Super Users

Designate a cross-functional group of strong performers to engage early and often with the system as Super Users. Empower these knowledgeable users to become your eyes and ears “on the ground.” Super Users can help convey project updates; support solution design, configuration, and testing; inform and help deliver change impacts; answer system questions before and after Go Live; conduct instructor-led training; and gather and escalate feedback to the project team throughout the process.

Consider how Super Users will be onboarded, supported, and enabled along the way. Create a steady cadence for touchpoints that combine project updates and two-way dialogue. Be clear about the roles and responsibilities upfront to secure buy-in from their managers and business unit leaders regarding taking on this role, with an estimated percentage of the time it will take to do it well.

Make sure Super Users are appropriately seeded across the organization. When sizing the project team and Super User network, consider the number of end users, the level of change, and resource-intensive project phases (e.g., when testing overlaps with training).

Encourage Super Users to invest time upfront to make Go Live smoother and decrease time-to-competency after launch. Make sure they’re ready for time investment increases with testing participation or before and after Go Live. For multi-year implementations with staggered Go Lives, bring the later-phase Super Users into the process early to build upfront experience and learnings. It may be tempting to keep them focused on their day-to-day until later, but this time investment can significantly increase the success of later launches.

Training & Support

Align learning and training to organizational needs and learning preferences along with the technical and physical infrastructure. Determine the right modality (eLearning, virtual, instructor-led, etc.) and curriculum. There will likely be a mix of foundational courses that everyone needs, as well as function- or role-based courses that address specific processes.

Provide big-picture context for processes up front—especially for ERP systems where upstream and downstream impacts are so significant. Think through the support tools for end user practice (job aids, quick reference guides, etc.), and ensure that learners know which Super Users are available to help afterward. If possible, leverage Super Users to deliver or directly support training events. Facilitating Train-the-Trainer sessions will position them for success.

Document how many processes or transactions need to be taught, and to which audiences. This will give you a rough estimate for the total amount of learning time. Adjust this estimate over time as new transactions, processes, and system characteristics are defined. If doing role-based training, inquire into the number of system security roles. (While training roles need to closely align, there are generally fewer training roles than system roles.)

Determine who will be responsible for training logistics. To address coordination complexities, identify who will own the creation and management of training schedule and invites, and what software or tool they will use. For in-person training, know who will coordinate the details of the classroom (physical space, hardware/software and IT needs, room setup, managing print materials, etc.). Confirm availability of test data for hands-on practice during and after the sessions. Identify how you’ll assess learners based on your objectives. This can range from instructor observation of transactions and thought processes to formal computer-based tests.

Measurement & Evaluation

Align change management efforts to the business outcomes and success metrics defined for the overall initiative. In addition to tracking project-wide metrics over time, it takes a combination of qualitative and quantitative feedback to gauge how adoption is going throughout a project. This feedback also informs go-forward approaches or change management interventions to course correct and mitigate gaps.

Make sure you can answer the following questions:

- What are we measuring?
- Who will measure it and how?
- When is the best time to measure it?
- What will we do with the results?

Deliver an end user change readiness survey after broadly communicating the "why." This effort can help you gauge basic understanding of the business case while providing an early benchmark to compare progress against future surveys and project milestones. Example readiness survey prompts include:

- "I understand why X initiative is important."
- "I understand the high-level changes that X initiative will bring to my work."
- "I know where to get help or ask questions about X."

Consider separate Super User surveys to "check the pulse" of what this key group needs to be successful over time. Another option is to use demographics to build in specific questions for Super Users as part of broader end user survey completion. Leverage qualitative insights from Super User meetings, executive committee meetings, and stakeholder interviews to continually improve change management efficacy. Ensure your stakeholders feel heard by sharing out the key trends from their feedback, including the high-level actions you'll be taking to address what you heard.

Other Key Considerations

Manage between the lines of the project plan. Good change management involves deep involvement in the project, along with nuanced influencing at all levels. Project leaders need strong networks within the organization to gather support, rally resources, and mitigate risks effectively.

Make readiness the criteria for Go Live. To avoid the mistake of managing only to budget and timeline, make data quality, systems readiness, and people readiness your drivers of a go/no-go decision. There's always risk involved when going live, but the project team, project leaders, executives, and other stakeholders should all give the green light so that everyone feels ownership of the decision.

Sustain the change by capturing success stories and reporting frequently on metrics post-launch. Individuals appreciate transparency about what's working well and where you need to make adjustments, including where additional human support interventions may be needed.

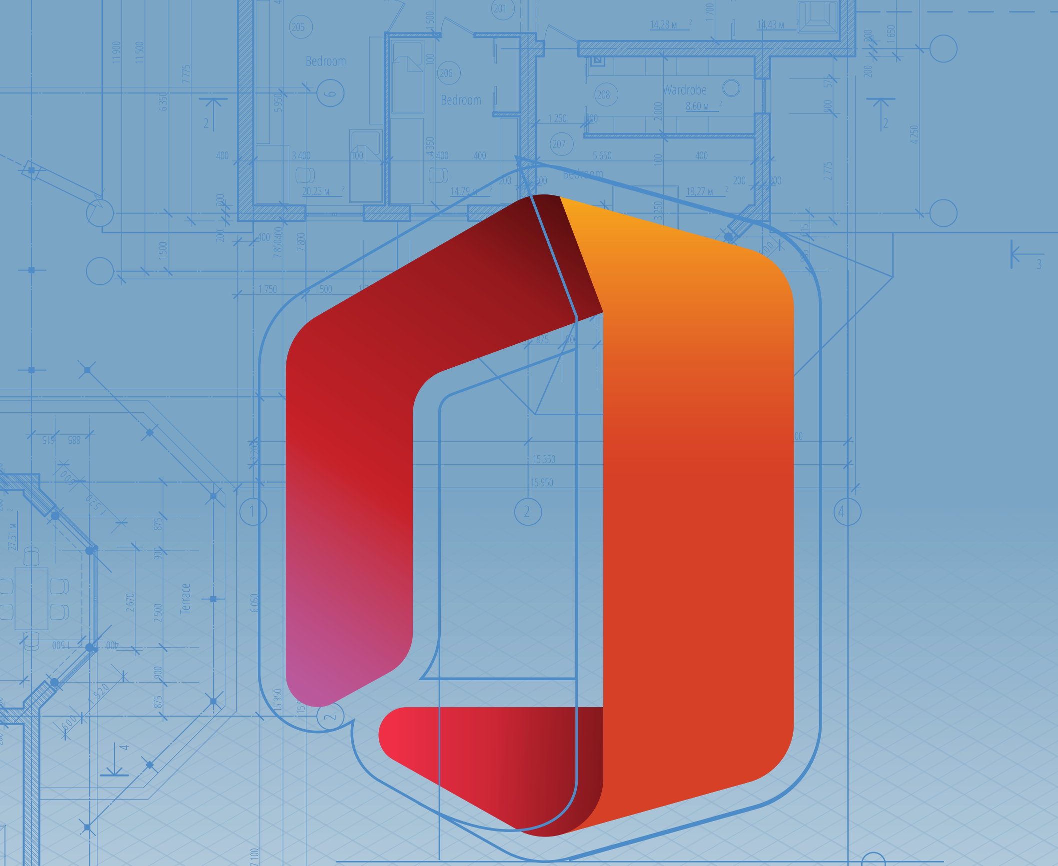
Support and reward your project team. Take time to build a strong foundation for mutual trust and teamwork. Whether you're an end user or project team member, implementations are not for the faint of heart. In all phases of the process, plan celebrations and rewards for the project team, Super Users, and end users to mark progress and key milestones.

The common thread: people readiness matters

If getting everyone aligned for Go Live feels like herding cats, it could be a sign that there's a critical thread missing in your adoption strategy. The time, effort, and resources required to apply these people-focused principles will enhance your ability to deliver on the projected business outcomes. Weaving people readiness throughout is sure to lead to the common thread of success. T1

about the author

Abby Bolton is a Senior Change and Communications Consultant and Strategist with extensive experience helping organizations position critical initiatives in ways that engage, inspire, and motivate for results. With numerous ERP and HRIS system implementations under her belt, Abby enjoys synthesizing complex ideas into compelling messages and visuals. When not wordsmithing or managing change, she loves nature walks, painting, and dance parties with her two young children and husband.



SUCCESSFULLY BUILDING MICROSOFT 365

By Corey Leverette & Stephanie Roberto

The goal for any end-user productivity tool is to maximize every aspect of work to its full potential. Many organizations have shifted to Microsoft 365 (MS 365) or Google Suite, yet driving successful adoption of these platforms—where teams are saving time, energy, and “churn,” so that end users can focus and execute effectively and efficiently—can be quite different from other enterprise-wide platforms.

Achieving a deep, organization-wide adoption of end-user productivity tools presents unique challenges. Platforms like MS 365 offer an array of opportunities to deliver experiences that will create benefits for individuals, teams, business units, and the organization. At the same time, the ability to custom configure and the sheer volume of configurations available within the platform can be daunting. Combine that with the traditionally hands-off approach to guiding users through systems, and often organizations wind up struggling with where to start, how to start, and how to support users as they leverage the platform more extensively.

At TiER1, we leverage UX design best practices and a deep knowledge of MS 365 to help performers use the right features with the right configurations so they can have the right experience — one that feels useful and easy to them, and adds value to the organization.

Getting Started with Microsoft 365 adoption

One gold mine that we see regularly go untapped is the suite of digital collaboration, documentation, and presentation tools found in MS 365, including Teams, OneNote, and Stream. Most people pay for the subscription, but many don’t leverage all of the tools, or if they do, they do so begrudgingly.

When we think of Microsoft, we often think of the individual Office applications we have used for years to write reports, crunch numbers, or create presentations. With MS 365, the focus shifts away from the individual applications and toward a singular “front door” to the variety of applications made available through the platform. This shift is experienced by users through the Teams application. Users don't have to think about 1,000 different places and documents; instead they can access it all through the “front door” of Teams.

Microsoft Teams integrates the wealth of applications in the MS 365 suite, as well as integrating with countless third-party applications, all presented to users as a unified, single-screen experience. It’s a powerhouse for virtual collaboration and workflow. From Teams, you can schedule meetings, record, take notes, create and share documents, converse with your teammates, and build comprehensive Wikis for your projects. (And that’s just the basics.)

This tool has been pinned to many a taskbar, yet that alone won’t ensure that people know how to maximize its potential. To unlock the full benefits of these features, we must help people to embrace the opportunity to learn and adapt to new ways of working.

Driving Microsoft 365 adoption across the organization

When driving towards a deeper and wider adoption of a platform like MS 365, consider applying the following four concepts in addition to leveraging the framework of a solid systems adoption plan.

Establish Governance

MS 365 is a collection of platforms, applications, and tools, with wide applicability and integration capability with many other platforms and tools. Using MS 365 is rarely mandatory, except for document applications (Word, PPT, Excel). Even then, accepted norms, practices, and workflows are not often optimized, even within an established team.

Our tips:

Create guidance and provide standards for:

- Setting up a Team and Teams channels (Owners and Members), and other information architecture standards such as folder structures, tags, labeling, and naming conventions.
- Storing files that are adaptable to individual teams, including file naming conventions.
- Posting comments to maximize engagement and search.

Document core structures and processes around:

- Meeting setup, including whether you're using Teams and Outlook interchangeably, as well as linking meetings to Teams channels.
- Note-taking, such as using OneNote or the meeting notes feature in Teams.
- How to record meetings and how to find recordings for those who cannot attend a meeting.
- File linking and file sharing.

Provide Guiding Examples

Unlocking the full potential of MS 365 requires a shift in mindsets and behaviors. One of the biggest mindset hurdles is "my document" or "my stuff" in a shared, collaborative digital environment. There can also be learned mistrust among end users due to previous negative experiences with technology. To lead end users to want to adopt MS 365, design case-based Teams sites informed by your governance to then be socialized and piloted across your organization.

Our tips:

- Build out a business case based on common team types across your organization, such as sales, product, finance, or tech.
- Leverage your governance to create sample Teams sites that can be utilized by these teams to get them started.
- Introduce simple process or workflow frameworks, examples, and templates that can be easily modified.
- Set up appropriate application integration samples by business case.

Adapt to End User Feedback

As your organization engages with MS 365, especially through Teams, driving productive adoption means you need to be agile and responsive to end user feedback. Creating an active feedback loop will provide you with insights on the features and applications your teams find valuable, the digital workflows they need as they adopt new ways of working, and the enhancement to governance that will unleash their potential. Adapting to end user feedback will also build trust that their ideas are heard, valued, and acted upon.

Our tips:

- Set up a feedback loop for your core teams using metrics built into the Teams interface to monitor activity in their channels and evaluate needs for design improvement.
- Adjust workflows and add more complex workflows as MS 365 continues to evolve and provide new tools, AI, and methods to support digital ways of working.

Capture Value-Add Tasks and Goals

It's critical to understand how end user tasks that will be accomplished via the digital environment will add business value or help the organization reach its goals. Identify common team types throughout your organization and engage with them to understand how these teams operate, communicate, and collaborate today.

Our tips:

- Identify how people currently use the tools, as well as how they want to use them or how the organization would like the tools to be used.
- Benchmark whether those activities are effectively supporting the business unit goals. T1

about the authors

Corey Leverette is a Principal Consultant at TiER1 with extensive experience in culture transformation, employee engagement, and behavioral change—all aligned to create value. When he's not connecting people, performance, and value, he loves spending time with his wife, their rescue dogs, and many nieces and nephews.

Stephanie Roberto is a Senior Solutions Technology Consultant at TiER1 who is passionate about combining technology and visual design to deliver innovative and engaging experiences to end users. She loves being creative and guiding clients through the creation of technical solutions. Outside of work, Stephanie enjoys running, pure barre, and pilates.

HCM ADOPTION

BEYOND TECHNOLOGY

BY RACHEL BRECHT

AS THE ROLE of Human Resources (HR) has shifted and transformed, with an increased focus on optimizing the workforce experience, HR technology has also transformed. We've seen the shift from transactional personnel systems of record to transformational data-rich platforms. Newer Human Capital Management (HCM) suites offer more to organizations than their predecessors, such as the ability to automate workflows, leverage artificial intelligence (AI), collect and share real-time data, and truly optimize workforce experience. Yet, driving adoption of HCM tools can be complex, as the learning curve is steepest around new ways of working, not the technology itself.

As you embark on your HR transformation journey, accompanied by the integration of HCM technology, here are some strategies to drive adoption and, in turn, deliver on long-term value for your workforce and the organization.

START with Data

One of the most powerful benefits of new HCM technology is access to data and trends that can equip HR and leaders to make more informed decisions about the workforce. Being able to articulate the value of this change to the organization and how it will impact their everyday jobs is imperative. With some HCM tools, leaders have real-time access to headcount, performance, tenure, compensation, diversity, and engagement with the click of a dashboard. There is inherent power in HCM data and getting it right early in the process will exponentially accelerate adoption.

Amber Battaglia, Sr. HR Operations Manager from PNC Financial Services, shares, "Give yourself enough time to understand and evaluate the data prior to and throughout the implementation. With data being a core and foundational component of a large transformation, rushing any exercise around this can create long-term irreversible issues with your business processes, integration work, and adoption."

ASSESS for Broader Impact

Invest time into assessing stakeholder groups and broad impacts, going beyond technology to also identify relational, capability, process, culture, and business impacts. Adoption is accelerated when people have a clear understanding of not just how to use the technology, but why, when, and who to work with as part of the process.

Adoption is also aligned with the desired employee experience and long-term business strategy. The working relationship between HR, managers, and leaders often changes as a result of an HCM integration. It's important to know those impacts early, and address them in your adoption plan with clear communication, alignment, and learning tactics.

ORIENT Messaging to Value

Let's face it, HCM integration is often the hardest for managers. Engaging stakeholders early in the process and clearly articulating the long-term value of the technology can directly impact the rate and speed of adoption. To accomplish this, messaging needs to be directly oriented to value for each stakeholder group. For example, your managers might want to know what they will be asked to do and how this will help them manage their team. Similarly, leaders and executives might want to understand how data aggregates to key metrics around retention, diversity, engagement, and cost. HR business partners might want to know how they can help support their leaders in a more strategic way and how the technology can help them accomplish that. Messaging matters, and addressing the needs, wants, gains, and pains for each group will set you up for success.

Missy Paxton, Director, Office of the CIO at Mylan, shares, "It's important to remember that investment in technology is made with an intention to provide an outcome. All stakeholders—those consuming, implementing, and buying the solution—need to understand that outcome and the part they play in achieving it. Think about your favorite sports team—the outcome is to win the game, and every player understands what they need to do to help their team win. Just like a sports team, every stakeholder group needs to see themselves as part of the team to make things happen. This effort isn't easy. It takes alignment, practice, dedication, communication, and a clear vision of the goal. Whether it's blocking and tackling or going for the goal line, when everyone is aligned to the outcome and how they contribute, it's a winning formula!"

BUILD HR & Manager Capability & Role Clarity

HCM technology training is often straightforward; building a bank of step-action resources for stakeholders to use in the moment is a standard best practice. That said, HCM often comes with significant changes in process and workflow that happen outside of the system. These changes might shift ownership of certain activities that have historically been owned by HR to Managers (e.g., creating a requisition, adjusting compensation, or separating employees). HR's role often shifts to a consultative function and partner to managers, instead of performing tasks. It takes time and intentional effort, both communication and learning, to build these skills.

Maria Raymond, Global Leader of People Insights at PPG Industries, shares, "Our global WD implementation included building a tier 0 learning tool, the PeoplePulse portal, which is enabled through ServiceNow technology. Our implementation team documented our core HR processes and created supporting knowledge articles and quick reference guides that clearly articulated the role of the HR Manager and the leader. In addition, we provided video tutorials and a comprehensive manager guide. And we continue to refine our approach! We recently conducted surveys and end-user focus groups to better understand how people are leveraging the portal. The result is a refreshed landing page and article updates to maximize our search results."

DESIGN for the Moment of Need

HCM adoption is a slow climb as system usage is based on moments of need, both in the short term (hiring, separating employees, etc.) and longer term (performance, talent review, succession planning, etc.). Adoption needs to be managed and measured over a longer period (at least one calendar year) after Go Live, and the interventions to support should be designed accordingly. Instead of conducting heavier upfront "systems training," we see better results in increasing communication to drive awareness and understanding. Follow this up with tools, resources, and support for those moments of need, and building muscle across the organization on how to find resources when they are needed.

Susan Bonidie, Director of Learning & Development at Eaton, shares, "Communication and learning are on an experience continuum, and organizations need to choose the right intervention via the right channel at the right time to help stakeholders make the mental and technical leap to new ways of working. One size, one time does not fit all, and we need to design with that in mind."

Taking the leap to upgrade your HCM technology is a strategic decision that will certainly enable your organization to optimize your workforce experience, achieve business outcomes, and deliver long-term value. Having a clear vision for data, a laser focus on your stakeholders and their role in creating value, a strategy for building capability, and the right tools and resources integrated into the flow of work will accelerate adoption and the return on your capital investment. After all, the potential of every organization lies within its people. T1

about the author

Rachel Brecht is a Principal consultant, and TiER1's Director of Organizational Development. In this role, Rachel partners with TiER1 business and functional leadership to support internal connectivity, growth & development, and talent programs aligned with our strategic priorities and long-term growth. She has broad experience leading large-scale initiatives in talent strategy, change management, organizational development, communication, learning, performance management, and everything in between. When not activating strategy, she loves spending time with her family, reading about behavioral science, and perfecting her homemade ravioli.

ERP ADOPTION

By Brandee Abel, Jenn Archila, & Ralph Huser

There are unique challenges to driving adoption of ERP (Enterprise Resource Planning) and other information systems. On one hand, use is generally compulsory, as core company functions and transactions sit within the ERP. On the other hand, it's challenging to achieve adequate proficiency at Go Live, let alone achieve target returns on investment over the long run.

ERP implementations are unique in that failure to implement successfully can have disastrous effects on productivity, revenue, customer experience, customer trust, and more. A bad Go Live can bring an organization to its knees with no quick fix for complex issues that are difficult to diagnose. Every ERP implementation impacts productivity at Go Live, but how long it takes to get back to base-level productivity can be positively impacted by investing upfront in people readiness.

INVEST IN EFFECTIVE PEOPLE READINESS

Many companies undertaking an ERP implementation find simplicity and convenience in engaging the implementation partner to lead the change and people readiness efforts. It's a trap! There is a natural and inherent tension between system readiness and people readiness, with various parts of the project team vying for time and attention from Super Users, workstream leads, business process leads, and others. When the implementer is handling both system and people readiness, the system always wins—and people readiness suffers significantly.

That's why it's best practice to engage with a third-party partner to help lead the people readiness side of change. Change leadership during ERP implementations involves a lot of risk identification, as well as nudging and influencing senior leaders on how to best support the project team and the implementation. External perspective can be invaluable here. When the change team is staffed only with company employees, they might lack the confidence to influence leaders and tenaciously tackle tough issues until resolution is achieved. They can be more susceptible to subtle, sometimes unconscious pressure from others to "back down" or let risks go unaddressed.

ENGAGE LEADERS AS ADVOCATES

Leaders generally support ERP implementations and help secure significant funding and resources. They help tell the story of why to the board and to employees, sit on the project steering committee, and can be counted on to travel to impacted locations for roadshows and other events to drive employee awareness, understanding, and buy-in.

When the water changes course, executive leaders in particular must understand the vital role they play in managing the tradeoffs that come with implementing an ERP system. Here are some key things executives can do to support a successful ERP implementation:

- Deprioritize competing initiatives and investments.
- Dedicate enough resources to ensure the people working on the project are healthy, well, appreciated, and engaged.
- Encourage and enable business leaders to invest time, attention, and resourcing in the implementation.
- Create a space for open and honest communication on project progress, challenges, and roadblocks.
- Welcome feedback and actively engage in helping the team find solutions.
- Reduce or eliminate barriers towards progress.
- Give the project team time and space when needed to work through complex business processes and system challenges.

SET UP SUPER USERS FOR SUCCESS

If there's one mistake we have seen over and over, it's failure to commit enough people to the Super User role, or failure to enable Super Users to fulfill the role adequately. Typically, Super Users are end users who are not part of the project team but are heavily involved in the project (designing processes, recommending system functionality, ensuring solutions work for their locations/functions, defining change impacts, learning the system ahead of everyone else, etc.). They are expected to fulfill the Super User role both during implementation as well as post-Go Live by providing support to end users.

Every Super User has a day job, too, and competing priorities happen every minute of every day. But it's critically important for leaders and managers to understand the role of Super Users and create space for them to engage in the project. The choice is to invest now or pay later; the more the business can invest in Super User proficiency and project involvement, the smoother their Go Live will be and the shorter the time to competency will be.

CONDUCT DETAILED IMPACT ANALYSIS

Implementers, project teams, Super Users, and business stakeholders often get impatient with the need to document role-based change impacts across all in-scope functions and processes. Yet this is one of the most critical drivers of ensuring people readiness. Just as every bit of data needs to be migrated into the new system with precision, so changes must also be proactively communicated to the right people prior to training.

Best practice is to leverage Super Users extensively in this process, from identifying end user impacts to communicating those impacts to end users with context. While the change team typically leads this effort, Super Users are the subject matter experts and facilitators. The business must actively and fully participate in the change impact process.

DEPLOY EFFECTIVE TRAINING

Training is most effective when end users walk into the classroom, webinar, or eLearning course knowing what to expect. This is not the time to unveil role or task changes—that should be done well in advance of Go Live.

Prior to formal hands-on training, leverage walk-throughs, demos, and other types of "show me" events to help people envision the end solution. Engage Super Users in delivering these sessions to improve their knowledge and leadership capabilities.

STAND UP A SUPPORT STRUCTURE

It's easy to feel lost during the first several weeks after an ERP Go Live. As end users apply what they learned in training for the first time on the job, the new process often doesn't work quite as expected and unanticipated system glitches pop up. Teams can avoid a meltdown if a thorough support structure is put in place before Go Live.

Your support structure should consist of many components, including the mobilization of your Super Users as the "first line of defense" to answer their teams' questions. A Help Desk staffed with both system and process experts should also be in place to address any questions that Super Users cannot handle. These strategies can be supplemented by a self-serve job aid repository. The goal of a strong support structure is to solve user problems and lessen their stress so they can focus on getting their job done.

MANAGE BETWEEN THE LINES OF THE PROJECT PLAN

Nearly all systems adoption projects will involve unforeseen challenges, and it's particularly true during ERP implementations. Build buffers into your timeline and expect delays. When you anticipate this shift, there is much less angst when it takes a month or two longer than planned to be truly ready for Go Live. Also, don't forget to leverage project leaders and your change team to nudge and influence the project at all levels. Effective change teams put together the scaffolding of support needed, then adapt as they move through the project lifecycle.

ERP implementations can be transformational because they're connected with almost every aspect of the business—making them the most complex adoption challenges out there. Set yourself up to successfully navigate the waters by investing in people readiness upfront and enjoy the thrill of the ride.

about the authors

Brandee Abel is a Managing Director and Strategy Activator at TiER1 Performance. She loves helping companies drive successful change programs and learn how to be more effective drivers of change in the process.

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Ralph Huser is a Principal at TiER1 who shines as a change leader for large system implementations. Ralph has extensive experience in change management, organizational design, process improvement, and learning strategy. He loves thinking of creative change strategies to help organizations really move the needle.

CRM ADOPTION

by Brandee Abel

Achieving total systems adoption can be intimidating, especially driving the adoption of Customer Relationship Management (CRM) systems. Successful CRM adoption is critical to not just keep up with competitors, but to leverage as a competitive advantage. And, no matter how good your CRM system is, it's only as good as everyone's ability and willingness to use it.

In interviews with end users, we've heard phrases like: ***"Using the system takes too much time." "I've been successful at selling and servicing customers up until now without a CRM—why should I change my process?" "Using it takes away from my time with customers." "The system is too cumbersome."*** The common theme we see is that people don't understand why they need to use the CRM in a consistent and disciplined way. Helping people understand the benefits **as they relate to their personal development** is half the battle.

The other half of the battle lies within the **system design and user experience**. The system must be perceived as a useful and valuable tool that enhances workflow. In essence, it must help sales and customer service users do their job better and more effectively deliver value to the customer. If the system's design fails in this endeavor and is only regarded as a burdensome distraction, or it lacks a user-centered configuration or design approach, adoption will not happen.

about the author

Brandee Abel is a Managing Director and Strategy Activator at TiER1 Performance. She loves helping companies drive successful change programs and learn how to be more effective drivers of change in the process. When she's not leading change, Brandee loves running half and full marathons.

TIPS FOR SUCCESS

HERE ARE A FEW WAYS that we have helped companies drive successful CRM adoption to achieve ROI and deliver real business results.

1. **CREATE A COMPELLING NARRATIVE ABOUT "THE WHY"** and equip leaders to tell that story to their teams easily and authentically. Reinforce "the why" again and again.

2. **ARTICULATE THE VALUE OF USING THE CRM SYSTEM** for teams and share "what's in it for us" as an organization. The communications plan should clearly connect the sales team to the quality of the data they are inputting and its impact on data analytics, key insights, and ultimately, business outcomes.

3. **UNDERSTAND STAKEHOLDERS:** who they are, what they can gain from system usage and data analytics, and what tradeoffs are required for adoption to be successful. Have a solid plan to ensure all stakeholders are aligned on the desired outcomes and the path to get there.

4. **CUSTOMIZE YOUR CHANGE PLAN** to drive adoption for intended users of the CRM system who are motivated differently. Adoption occurs at varying intervals and speeds within most organizations, so messaging must be consistent, delivered in different formats multiple times, and speak to relevant value points or motivating factors.

5

WORK WITH LEADERS AND MANAGERS to define their usage best practices, such as using reports to drive decision-making. Leader attitudes, mindsets, and behaviors have a **significant** impact on motivation and attitude within the sales and customer service teams.

6

IDENTIFY INFLUENTIAL SALESPEOPLE across the organization who will become expert CRM users and advocates for system usage. Position these experts as the go-to people for fingers-on-the-keyboard help and coaching other reps on best ways to succeed.

7

CREATE DASHBOARDS AND SUCCESS METRICS that reflect system usage. Talk about the data, reflect on insights, and use the data for coaching and development conversations. Make the data central to the role of selling and visualize that data whenever possible.

8

IDENTIFY AND REMOVE BARRIERS TO ADOPTION. If salespeople have outdated phones and clunky laptops, they don't have the tools they need for success in a digital world.

9

THINK ABOUT REWARDS AND RECOGNITION PROGRAMS. If you reward salespeople for time spent with customers, but not for capturing data and reflections about that time, you're creating your own adoption issues.

10

UPDATE JOB DESCRIPTIONS AND PERFORMANCE METRICS to include consistent, disciplined usage of your CRM. It's a critical tool for high performance, so reflect that in your people development and leadership practices.

11

GATHER AND TELL SUCCESS STORIES about sellers who drive positive outcomes through CRM usage. Celebrate those wins and explicitly connect the win with usage of the CRM.

12

REVISIT THE NARRATIVE ABOUT "THE WHY" OFTEN. Continue to connect usage to positive business outcomes, both in operational conversations as well as corporate strategic conversations.

If you're implementing a new CRM or want to supercharge your business results by driving greater adoption of your current system, we would love to be your thought partner. Let's talk! **T1**

Adoption of Agile Sprints

by Ian Herzog & Nick Pineda

One way of working that has caught momentum in system implementation projects is the use of Agile methodologies such as the scrum ceremony known as Sprint Planning. While many organizations have done a good job learning the *language* of this approach, they are still struggling to adopt the enabling *behaviors*.

Unfamiliar with Agile or sprint planning? No problem! Throughout this article, we discuss these concepts and how to best drive their adoption and put them into practice. Following are the steps your teams can take to best adopt this powerful activity.

Step 1: Define the Way of Working

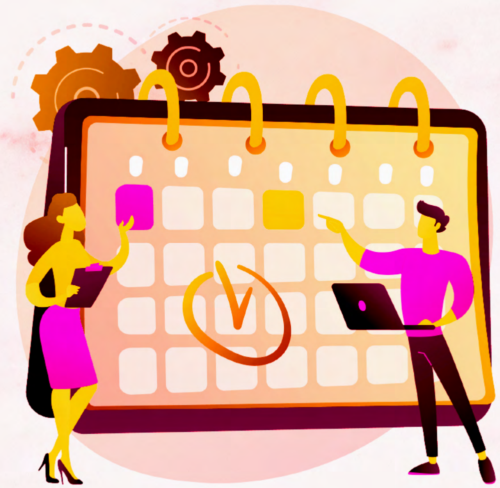
While you might not fully subscribe to a "pure Agile" practice, there are many activities and philosophies you can adopt from Agile to create ways of working that, well, work for you and your teams. Working in an Agile way means planning enough in advance to move quickly towards creating value while still allowing the team to adapt to changes over time.

A great way to achieve this in practice is by using Agile Sprints. We won't get into too much detail here, but a quick summary of an Agile Sprint is for a team, or individual, to work on the highest priority items within a specific amount of time. Many teams choose to time-box their sprints to one or two weeks in duration. The team kicks off their sprint with a Sprint Planning meeting where they review all the current tasks in their backlog and commit to completing a subset of highest priority tasks.

Step 2: Align on Guiding Principles

While working through the process, it's best if the team aligns to a few guiding principles. This helps the team make decisions quickly and move forward. For Sprint Planning, some core principles we recommend are:

- Create balance between upfront and just-in-time planning.
- Make tasks as clear as possible to increase the likelihood of success in execution.
- Focus more on adapting and re-planning than on conforming to a plan.
- Do upfront planning that's helpful, not excessive.
- Keep planning options open until the last responsible moment.



Step 3: Identify Critical Components

Best practices recommend sprint planning should take about one hour per week. For a successful sprint planning session, it is important to identify critical components well in advance. First, define the goals, scope, and behavioral norms for the sprint to provide clarity and alignment. Second, key roles such as scrum master, product owner, and team members with relevant skills should be defined to ensure team cohesion. Finally, the backlog of work to be performed should be as detailed as possible and ready in advance of the sprint planning activity.

Step 4: Incorporate Freedom to Adapt

Each team is different—their roles, experience, and work can be unique. Because of this, each team might adopt Agile ways of working differently to best fit their needs. We recommend balancing your focus on what you've lost with what you've gained when it comes to pivoting to a new normal. For example, you might consider looking at your new way of working and being explicit with your team about which components are completely fluid, somewhat flexible, or should be kept fixed.

The following table is a high-level view that calls out some of the pros and cons of remote or hybrid sprinting and sprint planning.

Old Norm	New Norm
Way of working is intuitive, especially when all are physically gathered.	Way of working is less intuitive, but "attention" to the work can be distributed and asynchronous with automated updates and alerts.
Team members participate one at a time.	Team members participate all at once (though turn-taking for conversation is still important).
Physical sprint boards are easy to visualize.	Virtual sprint boards are harder to visualize, but make it easier to track changes, review history, and sort and filter.
It takes time to make physical cards (though this keeps messages simple, as cards can't be overloaded).	It's much faster to create cards, but they can get overloaded with information. Some information is helpful, though (e.g. attach documents and control permissions).
Interactions are primarily face-to-face.	Interactions are primarily face-to-screen.

As you can see, there is a mix of pros and cons for Agile teams between the old and new working norms, especially in a virtual setting. The lack of face-to-face interaction might mean designing intentional face-to-face moments.

If you want to engage associates in adopting Agile Sprints, then empower them with the freedom to make behaviors their own within specific guidelines. As a leader, encourage teams to design these activities to maximize capacity for new strengths. Get "meta" with Agile by not only pivoting through the work, but also pivoting the way you work to take advantage of changes in tasks, teams, roles, environments, and pacing. In the end, as teams adopt Agile sprints and other new ways of working, they will be empowered to continuously adapt to the new normal. T1

about the authors

Ian Herzog is a Senior Solutions Consultant at TiER1. His diverse background includes creative and digital design, project management, process and operations improvement, change management, UI/UX, and software application development. He also has extensive experience leading client engagements in government and research. When not partnering with clients to develop new solutions for complex problems, he enjoys woodworking and anything outdoors.

Nick Pineda is a Director of Innovation at TiER1. He loves enabling teams and leaders to unlock their hidden potential to pursue bold visions for growth and transformation. Nick translates his passion, energy, and practical experience into innovative perspectives grounded in real-time, real-world impacts for clients. Fun fact: he's a former professional rugby player representing the Philippines against Hong Kong, Malaysia, and South Korea.

New Ways of Working

by Nick Pineda

Notes from the Field

Organizational growth has started to look different in the modern workplace. Beyond revenue and earnings, there are other forms of growth rising in relevance, and not all of them are fun to experience. As you face increased competition, these new types of growth call for new ways of working.

At TiER1, we believe that an organizational transformation process is the sum of many individual transformations. Through our consulting work, we've studied the science and craft of new ways of working, and we've learned that an adaptive workforce is the cultural glue that makes change stick. Exploring new ways of working opens a path to discovering possibility in the ordinary and a connection with common sense; change becomes frontline-led and bottom-up.

The ways we work are the sum total of the patterns of team behavior that make up the course of our everyday. Ways of working are how we get work done. Designing new ways of working is about putting the power of transformation in the hands of the frontline so they can create change that the team will actually adopt.

Ways of working are the principles, rules, and behavior patterns that guide our routines, rituals, and rhythms at work.

The ordinary quality of these ways of working is what makes them so powerful. They govern a majority of how we operate, manage, and decide what to do, yet we rarely examine them. As we have studied and experienced ways of working in action with our clients, three common patterns have emerged: routine, ritual, and rhythm.

Routine – Repetitive, unconscious patterns of interdependent behaviors between people that are habitual and help manage, accomplish, and process work (e.g., daily standups, email check-ins).

Ritual – Repetitive, mindful patterns of behavior that are intentional, meaningful, and symbolic, energizing and connecting everyone to a higher purpose (e.g., meditation, prayer, holiday party).

Rhythm – Seasonal, "long-cycle" patterns and natural cycles defined by the sector, industry, or function in which you work (e.g., editorial calendar, sales campaign).

An intentional approach to new ways of working empowers employees to change their routines, rituals, and rhythms based on their frontline experiences. When leaders place trust in their employees, giving them the freedom to adapt their ways of working as needed, it often leads to a more engaged, adaptable workforce that's better equipped to handle unexpected events.

The elements of ways of working are the familiar patterns and actions that make up our behavior. We often support these patterns with structures (policies, procedures, and technologies) that help to reinforce behavior. For example, in the ritual of family dinner, structure is provided by the room, the table and chairs, the utensils, and, more subtly, by who sits where at the table. Employees in organizations come to expect that same familiarity with work: the usual meeting times, team contributors, emails, and format of discussion. In both situations, much of what we do is so often the same that it fades into the background and goes unnoticed.

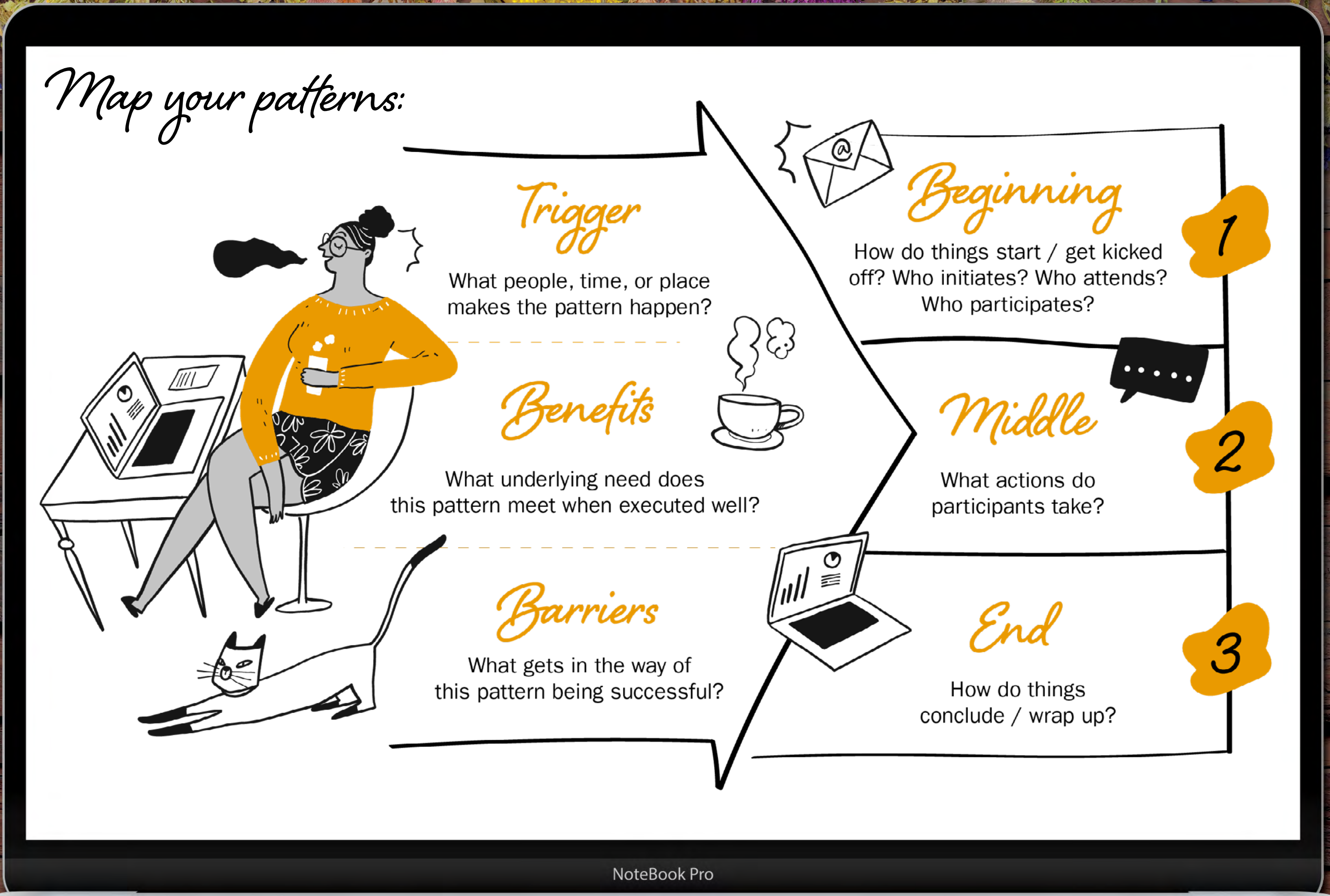
Elements that influence our ways of working include:

- **Rules** – Written, formal descriptions of prescribed behavior patterns and expectations.
- **Principles** – Conceptual guidelines that often function as basic truths for recurrent behavior patterns that enable associates to make decisions, especially when there is no defined way forward.
- **Patterns** – The behaviors as they actually happen, including the workarounds, back channels, and exceptions that people may utilize to keep work flowing.

Designing new ways of working

Developing new ways of working is ultimately about increasing your organization's capacity to grow. With growth comes the need for recovery and healthy transitions. This approach to organizational change is generative and puts the power of change in the minds, hearts, and hands of your frontline performers. Here are some principles to keep in mind as you get started:

1. Surface your patterns. Examine patterns with the greatest potential to have an impact on bringing your desired future into reality.
2. Break up the pattern into its parts. Identify the trigger or cue that indicates a need for the pattern to take place. Look at the sequence—the beginning, middle, and end to the way work happens. Document any barriers that make the pattern harder to get through, as well as any benefits that explain why a pattern exists in the first place.
3. Generate ideas for a new way. Reimagine the roles that participants play, the props that get used (think agendas, swim lanes, scrum boards) and the way time is structured to speed up or slow down the pacing of the work.
4. Try it out. Once your team has developed a new way of work, test it out. Find friendly eyes and ears that would be willing to be part of the experience.
5. Let it stick and evolve. Freedom is a critical component to this type of work. Patterns of behavior are by no means a formula or recipe. They evolve over time.



Many organizations start at the very bottom of the metaphorical iceberg of working culture with values, beliefs, and underlying assumptions. While powerful forces, they are also the hardest to see and change. Ways of working brings our focus closer to the surface—the words we use, the behaviors we partake in, and the structures we design to enable our work. Our recommendation: act your way into a new way of thinking. Pattern mapping is a great starting point for the journey.

about the author

Nick Pineda, Director of Innovation at TiER1 Performance, is based in Kansas City. He works with clients to activate transformation at the system, leader, and team levels by designing new ways of working that address culture as part of practical, day-to-day experiences. Nick's superpower is surfacing the unsaid and unspoken elements of group behavior into innovative solutions. He helps clients appreciate strengths and organize for growth from what's working today.

LEADING AGILE CHANGE

BY LEIA MCKINNON

about the author

Leia McKinnon is a Principal Consultant for Change Management at TiER1. She is passionate about applying brain-based principles to behavior change and helping employees deliver business value through exceptional performance. Leia also loves being a role model for her two kids and showing them the value of hard work.

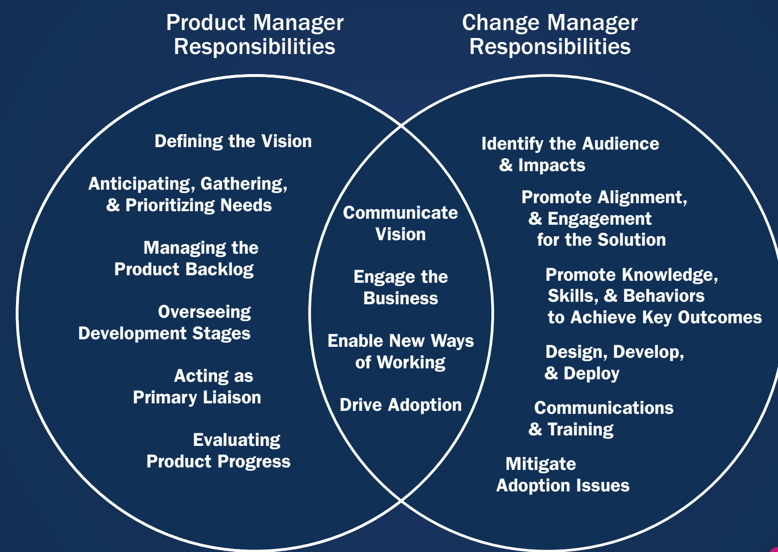
Long before the Agile Manifesto was penned in 2001, software developers everywhere were questioning their existing methods. The shared realization was that the traditional waterfall approach to software development was cumbersome and not responsive to the ever-changing needs of the business.

Fast forward to today: Most IT departments run some version of Agile (whether Agile SaFE, Lean Software Development, Scrum, or something else). While these development methods vary in focus, steps involved, and ceremonies conducted, they all share a grounding in the key principles of the Agile Manifesto. Embedded within these principles is structure and guidance on how to create and respond to change and uncertainty related to the technology—but what about the people using the technology? There's little guidance on supporting the adoption of new software or assisting people with the uncertainty that results from changing the tools required for their work.

At its core, software enables the work done by people, so we must ask…where is Change Management's place in Agile? Based on TiER1's experience working with agile development teams, we've found three primary integration points for Agile and change that can drive significant value.

A: EMBEDDED CHANGE LEADERSHIP

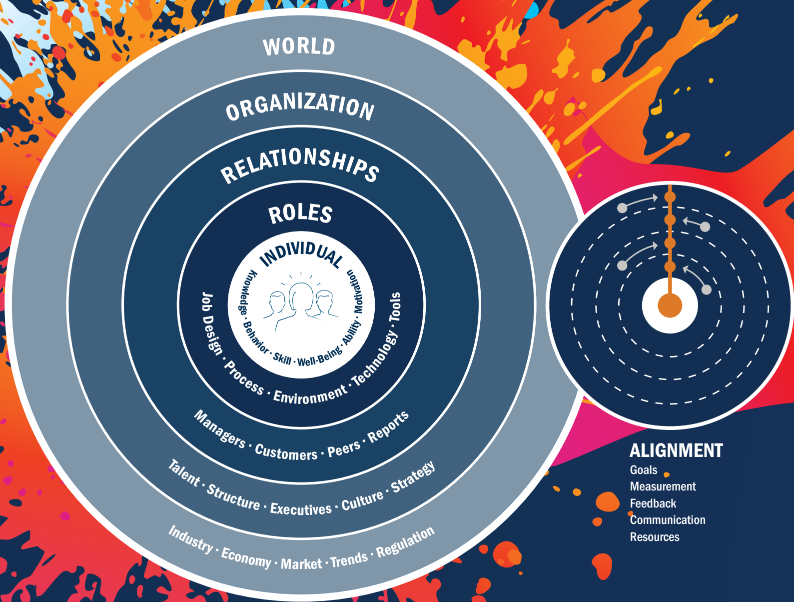
Within the Agile construct, the role of Product Manager acts as a liaison between the business and the software development team. Traditionally, the Product Manager serves as the voice of the customer. They understand the business case for the change and their role in driving value for end users. They are also domain experts who can relay detailed user requirements to the development team.



In other words, the Product Manager is the sponsor of the change, which also means they assume accountability for driving adoption of the changes being developed at their request by the Agile software development team.

Product Managers must possess a foundational understanding of change leadership, in addition to business acumen, to be truly successful. Unlike change management, which focuses on the tools and methods needed to plan and execute the change, change leadership focuses on the driving forces, visions, and processes that ignite and continuously fuel new ways of working. Change leadership requires effective communication and influence skills, as well as knowledge of how performance factors (internal and external) can affect your employees' key behaviors.

Product Managers and Change Managers must work alongside one another to drive adoption for the changes both incrementally and holistically. This goes beyond training end users on new features and how they enable their work. It extends to communicating a compelling vision; engaging the head, heart, and hands of those performing the work; removing barriers that prevent new ways of working; and having data-driven ways of measuring and monitoring adoption.



B. PRIORITIZE FEATURES BASED ON LEVEL OF EFFORT TO BUILD AND IMPLEMENT

Typically, software features are scoped and prioritized based on the level of effort required to build them in relation to the value they create. What is often not accounted for is the complexity of the effort required to implement the changes.

By taking a technology-centric perspective, IT organizations often miss impacts on the broader performance ecosystem and what it will take to align everyone around new ways of working. Remember, technology enables work, so changes to the technology (no matter how big or small) impact the ways in which people perform their work. At times, something that seems like a small-effort, high-value technical change on the surface can dramatically impact the organization, and require significant effort or time to resolve.

Changes that affect mindsets, behaviors, or interpersonal connections often require a greater level of alignment, clarity, and support. When assessing impact, map the individual employee or employee groups to the changes being implemented and the broader organizational factors that directly or indirectly drive behavior:

- **Roles**: A person's job function, core responsibilities, and tools they use to perform their work.
- **Relationships**: Mindsets, behaviors, and interactions with managers, peers, direct reports, or customers.
- **Organization (Internal)**: Interdependencies across departments, management systems, rituals, and cultural norms.
- **World (External)**: Industry regulations, market trends, and economic drivers.

Understanding the degree of impact at even the highest level allows the Product Manager and development team to have a more holistic, informed discussion about what it will take to implement the change and drive new ways of working that allow for adoption and realization of ROI. To create a high-level scope for the implementation effort, it's important to:

- Evaluate the overall scope of impact (number of regions, functions, employees).
- Evaluate the degree with which each role's core workflow will be changing (minimal, moderate, extensive).
- Determine the role technology plays. Are you extending the functionality of an existing system (new fields, reports, etc.) or implementing a brand-new piece of technology?
- Rate the significance of the mindset and behavioral changes required.
- Determine if the change requires any organizational structure or staffing changes, i.e., new reporting relationships, or job functions.
- Rate the significance to customers, suppliers, and other external stakeholders.

C. ACTIVATE INCREMENTAL CHANGES IN THE CONTEXT OF THE BROADER TRANSFORMATIONAL JOURNEY

Agile development offers “iterative” or “incremental” waves of change as new features and functionality are built, bundled, and released. Often these incremental features form the building blocks for a larger transformation. However, many times they are not planned, managed, or communicated that way, and can leave the end user feeling overwhelmed and disoriented. It also increases cognitive load, as everyone is left to decipher why the change is occurring and what success will ultimately look like.

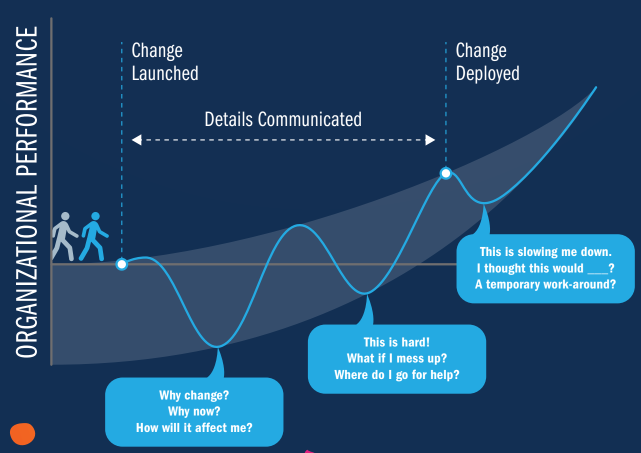
Two important aspects of this work include:

1. Leveraging an overarching change strategy and detailed release-based change plans.
2. Continuously reinforcing the big picture with each release of new functionality.

Let’s explore both in more detail:

Overarching Change Strategy vs. Release-Based Change Plans

A change strategy outlines how the transformation journey will achieve stated outcomes and provides direction and purpose for the holistic adoption efforts. It also outlines general guidelines for how support will be provided and what success looks like for the overarching program. Finally, it provides an adoption framework to measure the degree of adoption of incremental changes being released. This allows for real-time remediation and ensures ongoing performance support is available.



Alternately, a release-based change plan identifies the specific audiences, impacts, change tactics, and adoption metrics for each release. Change plans should incorporate the end user’s journey through change and design moment-of-need solutions to provide users with the right support when they need it most. They should also align with the overarching change strategy.

You can think of it like a jigsaw puzzle. The change strategy provides the pattern of the puzzle (general shape, the image), whereas the change plan is the detail that is visible in the individual pieces (how they fit together so perfectly to allow the image to appear). Each one individually will not create the desired outcomes for the transformation. But when they align, they complement each other and lead to fully adopted new ways of working.

Continuously Reinforce the Big Picture

Without sharing a vision for the broader transformation and a roadmap showing how successive waves of change will support the achievement of it, features being released on a frequent and iterative cadence can begin to feel like “death by a 1,000 paper cuts.” Over time, this can lead to change fatigue, apathy, and disengagement.

As a rule, features that impact the employee or customer experience should be grounded in the overarching vision for the transformation and how they enable it. Journey maps and other visualization tools are useful for showing the path to a future state and what it will take to get there. The bottom line: The more that end users can see how their efforts contribute to the broader transformation and understand the incremental steps to get there, the more they see how their work contributes to achieving that, and the more committed they will be.

There is no question that Agile has revolutionized software development. The benefits of sensing and responding to customer feedback and achieving ROI quickly far outweighs previous methods. Just remember that it is not all about the software, but rather it is about the value driven by the PEOPLE using the software. T1

THE VALUE OF DRIVING SYSTEMS ADOPTION ACROSS ROLES

by Brandee Abel

about the author

Brandee Abel is a Managing Director and Strategy Activator at TiER1 Performance. She loves helping companies drive successful change programs and learn how to be more effective drivers of change in the process.

People readiness is the game changer of every successful system implementation. However, when it comes to funding, prioritization, and even understanding its value, too often people readiness is sidelined. Far from being the "soft stuff," people readiness can and should be defined, managed, driven, and measured. It belongs on the scorecard, in every project update, and as a topic in every steering committee meeting.

Every member of the project team is a valuable player in the game of change, readying people, and creating the environment for successful implementation. After all, it's people who:

- Gather requirements from other people.
- Design and build the system.
- Map processes and define new ones.
- Test and configure the system.
- Validate functionality.
- Migrate data.
- Help other people understand what's changing.
- Train others on how to use the system.
- Identify and mitigate risks.
- Troubleshoot and problem-solve at Go Live.

In the People Readiness Hall of Fame, the following six roles are critical for driving systems adoption:

PROJECT LEAD

Project Leads have a lot on their plate: delivering a solution that works, managing constraints, promoting team engagement and wellness, engaging the business, adapting plans to new requirements, and keeping executives in the loop. Juggling budget, time, and project risks is not easy, even if an experienced change team is leading people readiness. Effectively driving business outcomes requires Project Leads to engage all resources available to them, often including a dedicated change team for support.

Dan Clark, Oracle Project Lead, PPG Industries, Inc., provides this guidance:

"When issues arise, escalate early and often. Don't have more than a couple of meetings on any subject because spinning on decisions wastes time and money. Make a decision and move on."

PROJECT MANAGER

Project Managers oversee all aspects of the system implementation relating to budget, timeline, and quality, and they're responsible for integrating and coordinating all timelines and milestones. Ideally supported by a strong change team with people readiness experts, Project Managers play a significant role in identifying and mitigating a host of risks before, during, and after Go Live. Risk is inherent in any large system implementation. From process and workflow to system design, the change team is well positioned to understand risks and work with project team members, the business, and leaders to identify and implement solutions for people readiness.

John Patton, Change Management Specialist, Lexmark, shares:

"I've worked with some great project managers. The best are the ones who see people knowing what to do, why to do it, when to do it, and how to do it as critical as the core functionality of the system they are delivering, AND they view the change management team as experts in people just as a developer is an expert in code and configuring. The worst are the ones that only ask for a quick update, 'Did you send an email to everybody? Did you complete the training?' Be like the first."

SPONSOR

Sponsors of system implementation efforts make or strongly influence budget decisions, sit on the steering committee, and have significant influence on project decisions and resourcing. The change team is an ear to the ground across the organization. When the change team is external, generally the understanding is even greater because it's easier to ask questions, dig deep, spot trends, and see impacts to project and people readiness. Make sure your reports from the Project Lead aren't your only source of project information; broaden your sources for heightened awareness and a wider perspective.

BUSINESS STAKEHOLDER

Depending on what type of system is being implemented, Business Stakeholders can double as a primary sponsor or, instead, be one of many who are adopting the new system and related processes. Regardless, they're also juggling competing priorities to meet business objectives while simultaneously supporting the project. Change management is critical for minimizing risk to post-Go-Live productivity and ability to meet internal and external demands. It can be hard to justify shifting people's time and focus to something that could happen years from now (Go Live). In our experience, though, most business sponsors wish they had dedicated more upfront resources to people readiness once they get past Go Live, when lack of preparedness is most obvious and incredibly challenging to address quickly.

DEVELOPER

A developer's focus is the system, processes, and making it all work as expected for end users and business leaders. They might not be directly involved with people readiness strategies and activities, but they play a significant role in both. Change management is valuable because it drives adoption of the process improvement that developers have poured blood, sweat, and tears into creating.

As Doug Whiting, Global SAP Practice, DXC Technology, shares:

"The change team understands some of the critical tips and tricks for better user adoption. Efficiency often lies in a few small details that allow the business to achieve the desired results."

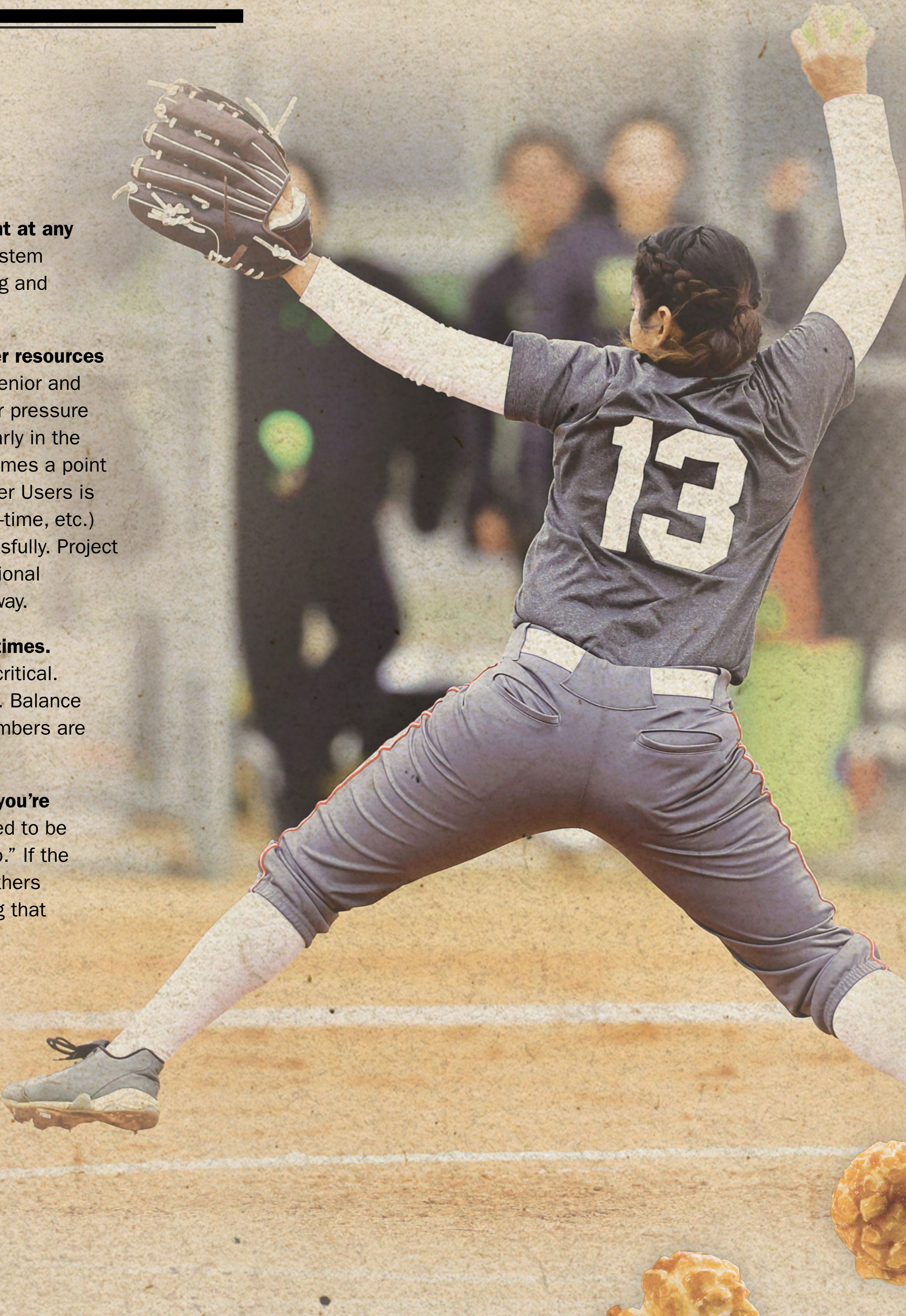
END USER

Of all the roles in a system implementation, end users are arguably the most important. If and how they choose to use the system and adopt new business processes will make or break a successful Go Live.

Change management is their champion and advocate in all things, often acting as the voice of the end user to the project team, sponsors, and business stakeholders. That doesn't mean change will be easy. Yet, as you navigate new responsibilities or new system capabilities, it does mean having a team dedicated to your success every step of the way.

TIPS FOR MANAGING TENSIONS ACROSS ROLES

- **Tension will inevitably arise regarding which critical path tasks are most important at any given time.** Work with other project leaders to ensure a healthy balance between system readiness tasks (such as testing) and people readiness tasks (such as documenting and communicating change impacts).
- **Gaining support for adequate project, SME (subject-matter expert) and Super User resources is not easy.** It can be an uncomfortable and time-consuming process to persuade senior and front-line leaders that resource investment is needed. The business is usually under pressure to deliver different outcomes, making it challenging to focus on people readiness early in the process. However, implementing a new system requires a resource lift, and there comes a point where that lift can't come from the existing team alone. Early involvement from Super Users is critical to long-term success (and a smooth Go Live). Extra resources (contract, part-time, etc.) are often needed to backfill existing team members and get through Go Live successfully. Project leaders can support end users and other stakeholders by gaining approval for additional resources and creating time and space for Super Users to engage in a meaningful way.
- **Balancing deadlines and project team health can feel like walking a tightrope at times.** Timeline delays mean budget impacts, but the health and well-being of the team is critical. Short-term pushes are often needed, but you can't let your team members burn out. Balance motivating and inspiring the team to high performance with knowing when team members are overwhelmed, pushing too hard, getting sick, or burning out.
- **When it comes time to Go Live, you lead the team in making the call on whether you're ready—or not.** Delaying Go Live is a big and unpopular decision. A lot of factors need to be weighed, and all major stakeholders need to share their perspective on "go or no go." If the risk to business continuity is too great, have the confidence and influence to help others understand a "no go" decision. Defining "go" criteria early in the project and making that decision multiple times leading up to cutover can help tremendously.
- **Tensions between system and people readiness are inevitable and healthy.** It helps to be balanced in prioritizing. Great people with a positive mindset can often make a bad system work, but rarely will people make a system work when they don't want it to work.
- **There will come a time when you need to make a decision about quality versus timeline/budget.** Don't let perfect get in the way of moving forward. Maintain business continuity and the project team's trust by slowing down when the right answer is to take more time to do it right.



PROJECT LEAD

As Project Lead, you have a lot on your plate: delivering a solution that works, managing constraints, promoting team engagement and wellness, engaging the business, adapting plans to new requirements, and keeping executives in the loop. You have overall responsibility for managing relationships with your implementation, software, and change management partners. Doing so well means creating a cohesive team across multiple functions and lines of business.

VALUE OF CHANGE MANAGEMENT:

It might be misleading to say that all these responsibilities are easier with an experienced change management team leading people readiness for your system implementation. But it is completely fair to say that your effectiveness in driving these outcomes is greatly enhanced by engaging an experienced change team to help you:

- Build a trust-based, cohesive team that works together effectively and efficiently.
- Drive engagement of the project team and mitigate issues or overwork risks (knowing when to adjust timeline, request more resources, reduce scope, etc.).
- Identify and address issues with the solution or system by working closely with future end users who know what will and won't work.
- Organize and facilitate team-building activities to build trust, engagement, and commitment.
- Work directly with Super Users, leaders, and future end users at sites and business units to prepare them for upcoming changes at a much more granular level.
- Understand and mitigate prioritization issues that come from executive leaders asking frontline leaders to deliver results that conflict with your project resourcing needs.
- Balance competing time constraints for Super Users and workstream/process leaders to ensure system and people readiness are both adequately resourced.

YOUR ROLE IN DRIVING CHANGE:

- Most project teams establish a senior leadership team including the Project Lead, Project Manager, Solution Architect, and a few others. Invite your Change Lead to that group so they can hear about what's on your mind, upcoming activities and events, and risks and challenges. It's also critical to hear firsthand from the Change Lead what's happening on the ground with soon-to-be end users and the project team. This helps keep everyone rowing in the same direction.
- Invest in team and individual development. Enable your change team to drive these efforts.
- Listen deeply and intently to all constituents to hear themes and identify complex issues that might not be evident.
- Work closely with the change team to size and scope the Super User network appropriately based on geography, number of end users, level of change, and function. Help convince other leaders that intense Super User involvement is a critical factor for a successful Go Live.
- Engage the change team to monitor, track, and report on Super User engagement throughout the project. Many times, Super Users are set up for failure because they aren't given adequate time and support by their direct managers. Your change team will see those problems before anyone else does, but they need your support to mitigate them.
- Help project team members to prioritize critical tasks and discern which issues will require deeper engagement.
- Engage the business (whomever the change will be impacting). Spend time with them to understand their priorities, how they measure those priorities, what obstacles they might encounter in supporting the implementation, and what business challenges they need to solve.
- Inspire and motivate others to high performance. Expect a lot, give a lot of yourself, and hold others accountable in a way that encourages engagement and excellence.

PROJECT MANAGER

Project Managers oversee all aspects of the system implementation related to budget, timeline, and quality. You might work with other project managers from the change team, workstreams, or IT, and you're responsible for integrating and coordinating all timelines and milestones. You work closely with the Project Lead (and others) to define governance, ways of working, reporting, and communication. You create status reports and explanation materials for the steering committee and other executives, including gathering input, information, and slides from others.

On large projects, multiple Project Managers representing different functions work closely together to ensure a successful implementation. This includes forecasting resource needs and constraints; working with affected stakeholders to remediate issues and risks; and balancing competing priorities across teams. Ultimately, Project Managers are responsible for leading an effective team, delivering a quality solution, and enabling end users to successfully adopt the new system and processes.

VALUE OF CHANGE MANAGEMENT:

Risk is inherent in any large system implementation, and your change team plays a significant role in identifying and mitigating a host of risks before, during, and after Go Live. While the change team isn't the tech or process expert, they are the people readiness expert. From process and workflow to system design, the change team is well positioned to understand risks and work with project team members, the business, and leaders to identify and implement solutions for people readiness.

Other ways they can help:

- Creating materials that communicate complexity in a simple, straightforward way. This helps with all aspects of communication, particularly executive leadership communication and gaining executive support for decisions and resource requests.
- Taking communications to the next level by creating a strong sense of team, keeping everyone informed, and making the project fun.
- Helping deliver ROI from adoption and project success. When your change team is deeply embedded in your project team, they are often working more closely with end users prior to Go Live than anyone else. This enables the change team to actively and effectively drive business engagement, which is critical to Go Live success.

YOUR ROLE IN DRIVING CHANGE:

- Part of your role is balancing system readiness AND people readiness; you must help prioritize both. The critical path isn't getting to Go Live—it's ensuring people are able to use a working system effectively at and well after Go Live.
- You have your finger on the pulse of the project, including key events, activities, issues, concerns, and celebrations. Invite your change team to those meetings and keep them informed of what's happening. This will enable the change team to be a positive and driving influence across the project team and the business.
- Particularly for large-scale projects, be mindful of consolidating various project plans and ensuring dates line up, milestones are appropriately mapped, and events are sequenced appropriately. A key aspect of alignment is accurately forecasting resource needs across the project, as well as planning for additional resources during peak periods of need to ensure adequate support for tasks.
- Set the standard for sharing information, explaining decision rationale, and trusting the team. Invite the team to share challenges and risks. Work closely with the Project Lead to create an engaged, highly functional, and accountable team.

SPONSOR

As Sponsor of a system implementation effort, you make or strongly influence budget decisions, sit on the steering committee, and have significant influence on project decisions, including people resourcing. You are involved in creating the business case and ensuring ROI is delivered. What you choose to focus on, what gets measured, the questions you ask, and your expectations significantly impact how the project team spends its time and thinks about challenges and solutions.

VALUE OF CHANGE MANAGEMENT:

- Change management is a critical driver of ROI and overall project success. Don't let change, communication, and training budgets get cut or minimized. Remember, people readiness is a game changer for every systems implementation.
- Visible support of the project behind the scenes and to the rest of the organization demonstrates your keen interest in helping the project team succeed. Work closely with the Project Lead and other key project leaders to monitor project risks and help make decisions when dissenting viewpoints or issues get in the way.
- Build a close working relationship with your change lead. Many a challenge has been discussed, root cause identified, and swift path to resolution formed through conversation.
- Connect with your change team in a way that feels authentic and comfortable to you. They're your ear to the ground across the organization, and they can bring a fresh perspective to the project. When the change team is external, generally the understanding is even greater because it's easier to ask questions, dig deep, spot trends, and see impacts to project and people readiness. If you're getting all your information from PowerPoints, meetings, and the Project Lead, broaden your sources for heightened awareness and a wider perspective.
- The change team also serves to provide you with concise, targeted communication tools to leverage in advocating for project goals, creating awareness, mitigating barriers, addressing resistance, and leading change.

YOUR ROLE IN DRIVING CHANGE:

- Employees want to do what makes them successful in their roles, and you define what success looks like. You have the power to define the criteria that drive change and adoption. Be THE change leader. Look for opportunities to share your vision for the future, address the tradeoffs that are required to attain the vision, and work to remove barriers to success.
- Set clear priorities that don't compete with one another. There's a fine line between inspiring others to high performance and asking for more than people can deliver, causing them to disengage. For significant change efforts, delay or relax other initiatives where possible to enable everyone to put their focus, attention, and priority on Go Live.
- Understand resourcing models and implications so that you can either go to bat for more resources when needed or set expectations with executives and others that outcomes will be different than expected if resourcing needs aren't met.
- Prepare for unforeseen obstacles. Where possible, leverage buffered timelines and contingency budget planning.
- Set the tone for camaraderie and teamwork across implementation, change, and other third-party partners.
- Network extensively within the project team, doing skip-level discussions with various workstreams, levels, and roles.
- Work closely with the business to prepare them for the change. Address their concerns and time or resource constraints.
- Empower your change team. Ask about people readiness, include it on scorecards, expect your change lead at every steering committee meeting, and mitigate people risks.

BUSINESS STAKEHOLDER

Depending on the system being implemented, you could be the primary sponsor or one of many who are adopting the new system and related processes. You likely lead people who will be Super Users and end users. You will be impacted by the change in ways that are beneficial but likely require tradeoffs (for example: more clicks for data collection, but greater visibility and predictive analytics).

You significantly influence who supports the project team, who becomes a Super User, how training is conducted (and when), and how much time people have to prepare prior to Go Live. You're also juggling supporting the project with competing priorities to meet separate business objectives.

VALUE OF CHANGE MANAGEMENT:

- Change management minimizes risk to post-Go-Live productivity and ability to meet internal and external demands. The change team is your advocate, raising up your voice to developers, leaders, and the broader team. They help communicate priorities and resolve many challenges.
- The change team will help you identify Super Users, those who are the strongest in system usage and related processes. They can also support identifying and mitigating current process, environmental, and organizational constraints that could negatively impact Go Live.
- The change team can also guide effective change communications for your role, as well as provide tools and messaging to make it easier. They will partner with you to find the most impactful ways to engage your team (end users). Work closely with them to explore and document specific changes and how end users will need to adapt to those changes, both with using the system and the processes that occur outside the system.
- You can depend on your change team to identify risks and pursue those with the project team to ensure resolution. The change team champions the end user in all things.

YOUR ROLE IN DRIVING CHANGE:

- Your role in driving change is multifaceted. Your mindset about the system implementation will make a significant difference. If you embrace the change, recognize the reason for it, and are willing to commit resources to people readiness and the project team, you likely need fewer change resources.
- Every minute spent on people readiness prior to Go Live is a minute less your team will have to spend learning the system or fixing issues after Go Live. If you invest heavily up front, there's a high likelihood that your Go Live will be smooth and you can get back to baseline levels of productivity relatively quickly.
- Share with the change team your expectations, concerns, and challenges. Allow them to get to know your team and your people deeply so they can best help you succeed. While the change team is your resource in driving and facilitating readiness, only you and your team can do the work required to be ready on Day 1.
- The change team will ask for access or time from some of your most critical team members. It can be hard to justify shifting people's time and focus to something that could happen years from now (Go Live). Many business sponsors, however, wish they had dedicated more upfront resources to people readiness once they get past Go Live, when lack of preparedness is most obvious—and challenging to address.

DEVELOPER

Whether as a process or application developer, your focus is the system, processes, and making it all work as expected. While you're not directly involved with people readiness, you play a significant role in it. In developing the process or application, you put yourself in the shoes of the user. You work until you fully comprehend the end-to-end processes executed within and outside of the system.

VALUE OF CHANGE MANAGEMENT:

Change management is valuable to you because it drives adoption of the process improvement you poured blood, sweat, and tears into creating.

The change team brings the project team closer to end users. A broader perspective from end users is always needed, and the change team expands those connections. They listen intently to end users so requirements are clear and obstacles are identified and resolved, allowing people to focus on adopting the processes you've built.

YOUR ROLE IN DRIVING CHANGE:

Unless people are using the system as intended, without questions, it's important to dig deeper into the "why." Common roadblocks include process issues, a lack of communication or training, software limitations, or a cumbersome system that leads to workarounds.

As end users engage in system demos, training, and practice, you play an important role in easing anxiety, answering questions, and troubleshooting challenges. These are great learning opportunities; when you can quickly explain why that result occurred and how to adjust to get a different result, you're driving adoption and building confidence in end users as they learn the system.

Work closely with end users to truly understand their needs and ways of working. Ask questions, challenge the existing process, and help them see what's possible. Take the opportunity to provide process improvements and offer solutions that work. Remember that tensions between system and people readiness are inevitable and healthy, but your work makes a difference.

END USERS

In a system implementation, your role as end user is arguably the most important. If and how you choose to use the system and adopt new processes will make or break a successful Go Live. Significant time and resources are dedicated to ensuring you understand why the change is happening, what's expected of you, and how to use the system on Day 1 (and beyond).

VALUE OF CHANGE MANAGEMENT:

Change management is your champion and advocate. They act as the voice of the end user to the project team, sponsors, and business stakeholders. The change team's top priority is helping you succeed—they identify and remove barriers and ensure the burden of change is evenly spread across individuals and roles.

That doesn't mean change will be easy, but it does mean having a team dedicated to your success every step of the way.

YOUR ROLE IN DRIVING CHANGE:

Your role is to actively learn about the new system, processes, and associated changes. Read communication, attend meetings, participate in training, ask questions, and speak up if needed.

As you learn, think about not only your role, but how your system transactions will affect others up and downstream. Understand what parts of your work can and cannot be done in the system. Pay special attention to changes that require communicating with other functions, departments, or roles—you might need to build relationships with people you've never worked with before.

Lean in. Practice with the system every chance you get. You can often impact how the system is designed, what processes exist, and how you will be trained. The earlier you engage with the process, the more successful you will be at Go Live and beyond.

improving ORGANIZATIONS *through the* PERFORMANCE *of* PEOPLE *to* BUILD A BETTER *World*

WHO IS TiER1?

Founded in 2002, TiER1 Performance Solutions is an employee-owned consulting firm that activates strategies through people. We bridge the gap between strategy formulation and its day-to-day implementation through an organization's most significant asset: people. We are passionate about consulting, designing, and building solutions that deliver meaningful, long-term success.

We've helped over 320 high-performing organizations including Kroger, P&G, NASA, Delta Air Lines, Humana, U.S. Air Force, ESPN, AbbVie, and FedEx (to name a few).

We believe that the potential for any organization lies within its people. By unleashing the best of both, we will change the world.

TiER1 PERFORMANCE

Facing a system implementation or change?

SOMETIMES YOU NEED TO EXPLORE WHAT'S *possible* BEFORE YOU CAN MOVE FORWARD.

An **Art of the Possible** offers your team the opportunity to untangle challenges, explore solutions, and harness creativity – all aligned to your unique objectives. Whether in-person or virtual, we bring together your team and our strategists for a collaborative *(and fun)* discussion. After we explore solutions and trends together, you'll walk away with fresh ideas and renewed energy to move your business forward. We invite you to **unlock your organization's potential** with a TiER1 Art of the Possible.

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