OCM: What Is It and Why Do It?
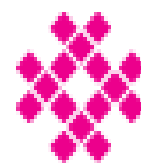
Today's Topics

A Little Story
A Difference In Perspectives
Some of the Data
The Nitty Gritty: Some Real-Life Examples

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The Parable of the Shipbuilder

Shipbuilder…or Change Leader?

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The New Ship

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Shipbuilder…or Change Leader?

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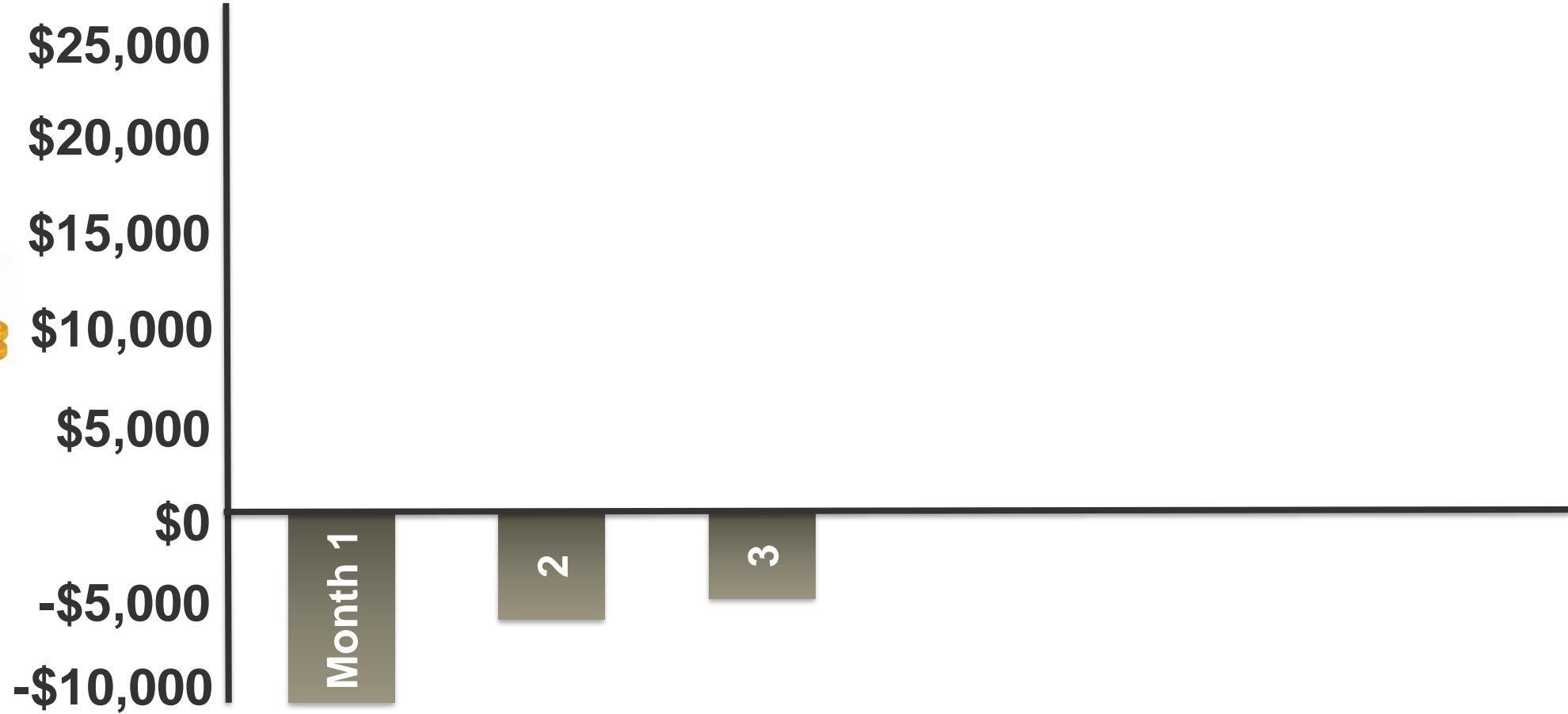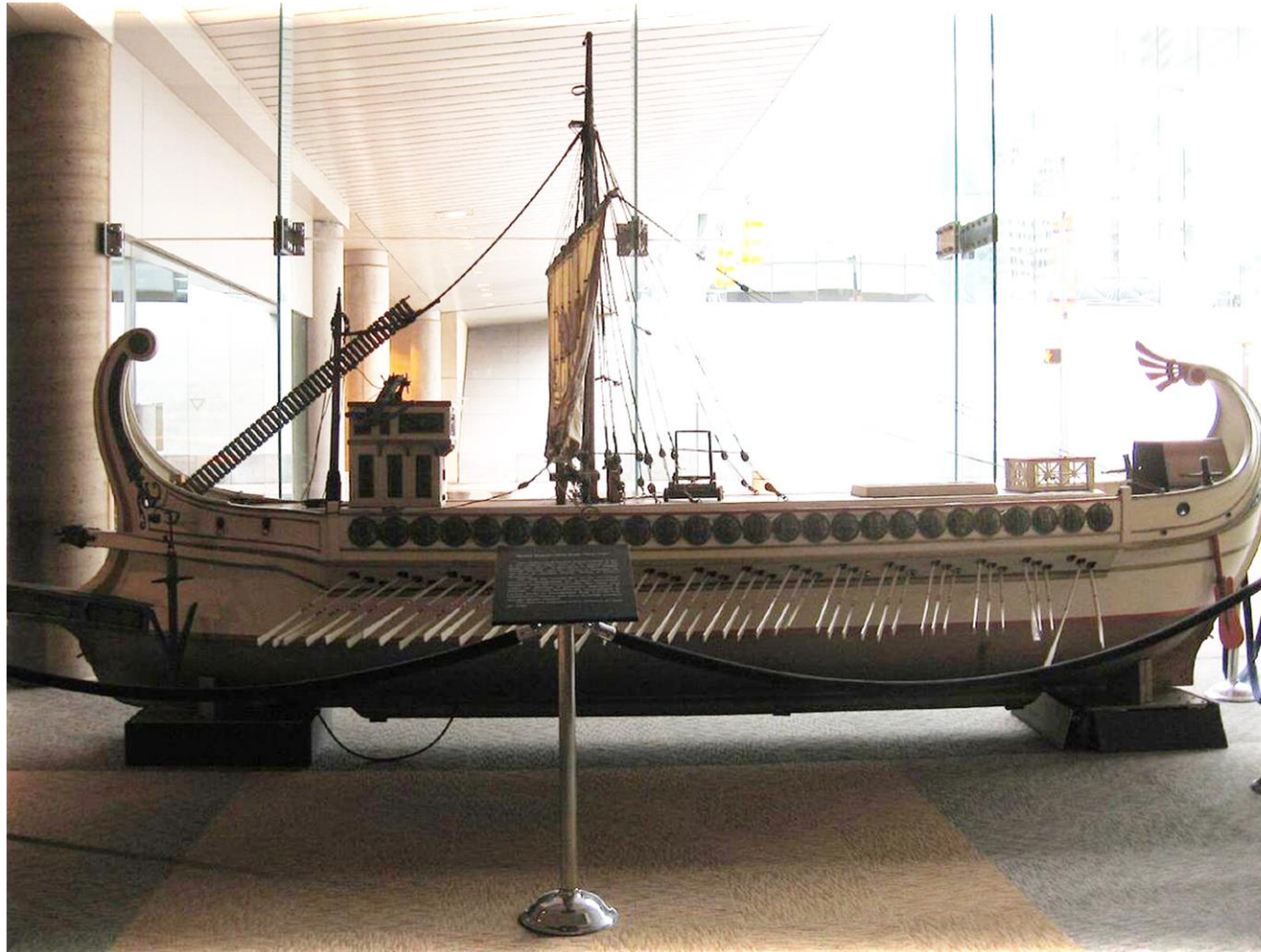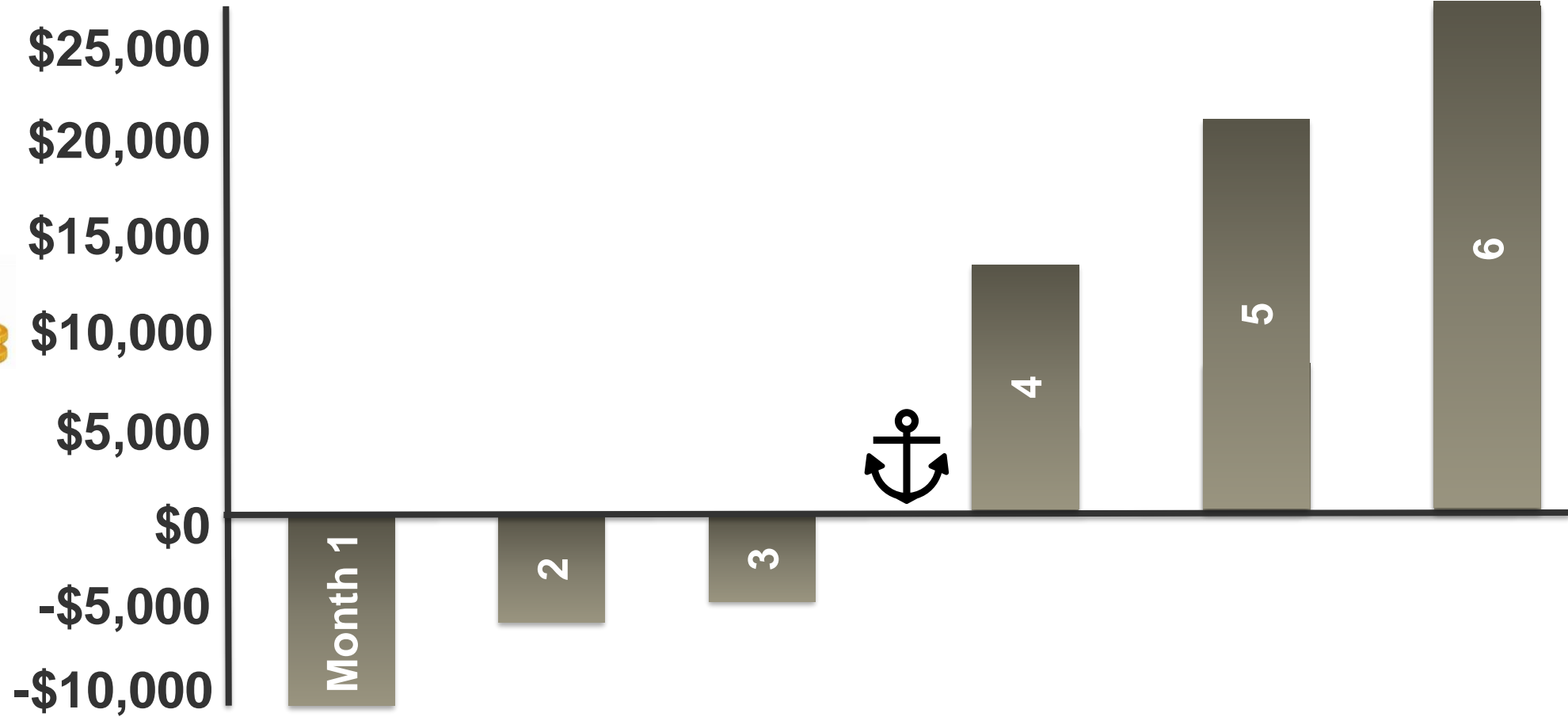
Project Goals: What Leaders Envision

Increased Efficiencies

Improved KPIs

Improved Customer Experience

Reduced Manual Processes

Improved Customer Service Metrics

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Project Outcomes: Differing Perspectives

- Increased efficiencies
- Reduced manual processes
- Improved KPIs
- Improved customer service metrics
- Enhanced customer experience

The Leadership Perspective

- Job loss
- Loss of control
- Loss of status
- Tougher KPIs
- More intensive monitoring

The Employee Perspective

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The Truth Is…

Quick Poll: What Do You Think?

How much of a technology project's benefits accrue as a result of the technology that is installed?

A: 90%

B: 75%

C: 50%

D: 30%

E: None of the above

Benefits accrued due to technology

20%

80%

Benefits accrued due to people

Prosci, Best Practices in Change Management, 11th Edition, p 87-88.

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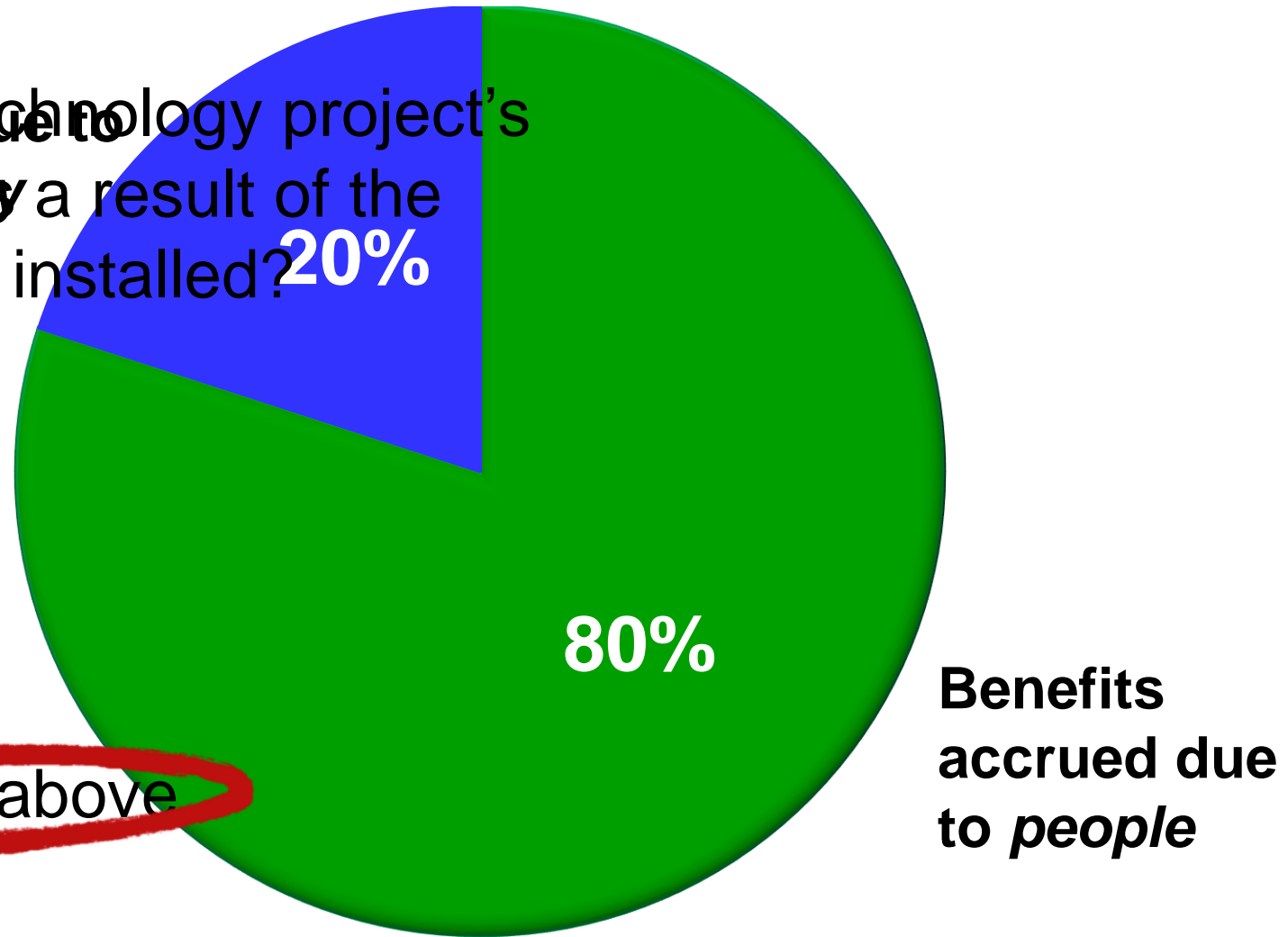
Correlational Data: OCM Makes a Difference

OCM helps projects succeed.

Met Or Exceeded Objectives **Stayed On Or Ahead of Schedule** Stayed On Or Under Budget

	Poor	Fair	Good	Excellent
Met Or Exceeded Objectives	15%	42%	77%	93%
Stayed On Or Ahead of Schedule	14%	32%	52%	71%
Stayed On Or Under Budget	48%	62%	70%	81%

Prosci, <u>Best Practices in Change Management</u>, 11th Edition, p 87-88.

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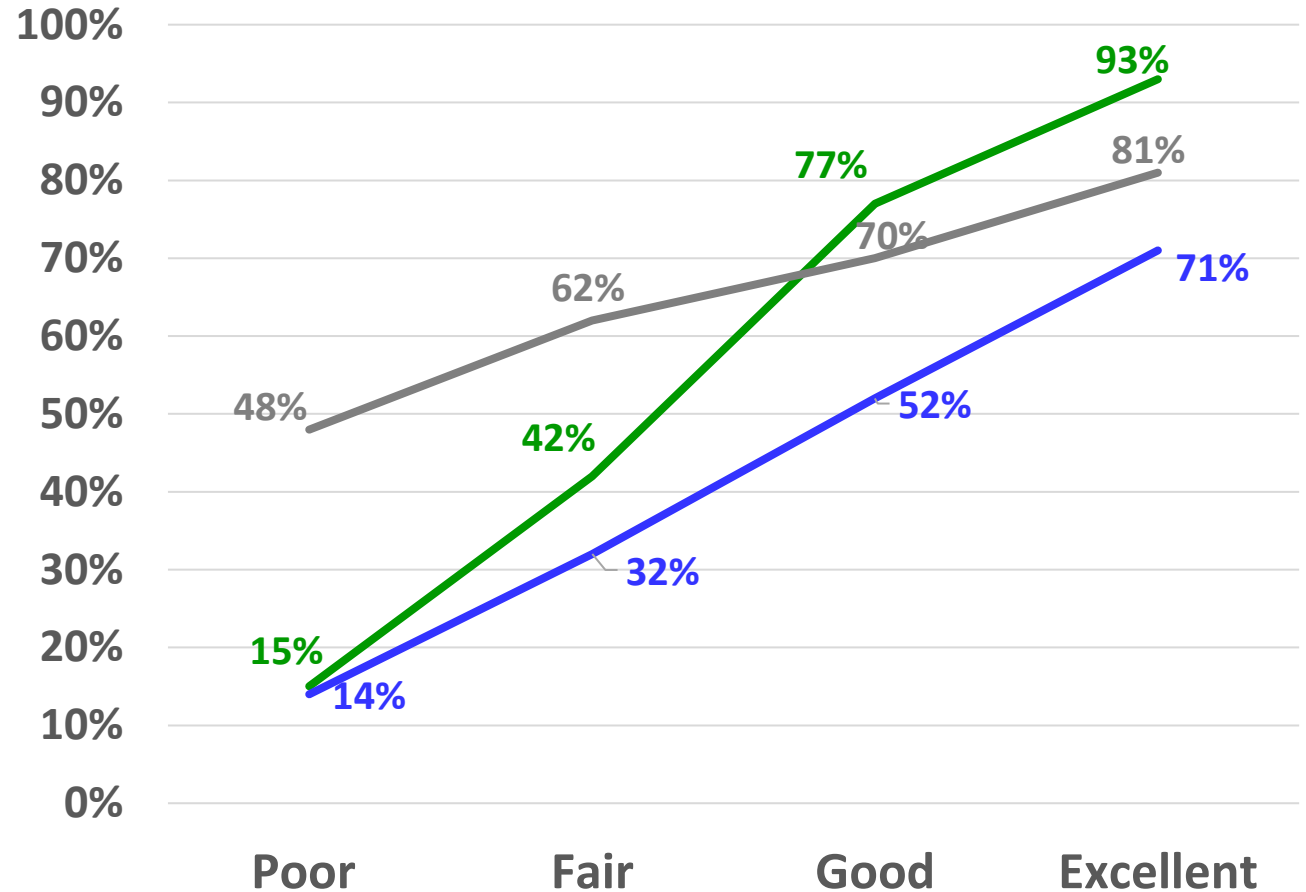
OCM Is More Than Training & Communication

PROJECT LIFECYCLE

Start **Post Go-Live**

Organizational Readiness

Stakeholder Management, Engagement and Sponsorship

Organizational Alignment

Communications

Training Integration and Go Live Support

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Supporting Change Acceptance

To help employees understand and begin the process of accepting changes, we must

– Provide *detailed, targeted information*

– *Engage early and often…*

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Example: AutoPay Enrollment

Change Description (the CHANGE): The process for enrolling in automatic bank draft for customer payments is changing.

TODAY

Complete a paper enrollment form and mail it in with a voided check.

TOMORROW

Enroll online through the customer self-service portal, or call and enroll by phone with a customer service advisor.

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Who Has Impacts?

Customers
- No more paper forms or voided checks
- Self-service enrollment
- Enroll by phone
- Immediate enrollment

Customer Service Reps
- Two new tasks: enrollment and offering autopay during turn-on and transfer
- Increased risk for error during manual entry

Call Quality Assurance
- New task to evaluate
- New rating criteria and point evaluations
- Update evaluation guide and training materials

Billing
Three "stop doing" tasks:
- No more mailing out paper forms
- No more scanning and storing forms and voided checks
- No more updating CIS

Accounting
- Potential faster receivables turnover
- Potential increase in positive cash flow

Internal Audit
- Decreased effort to audit autodraft enrollments and autopayments
- Continue with changes task: new process for auditing autodraft transactions

Collections
- Potential decrease in workload due to potential decrease in accounts entering the collections process

Payment Processing
- Potential increase in customers paying through automatic draft could potentially lower volume of physical payments to process
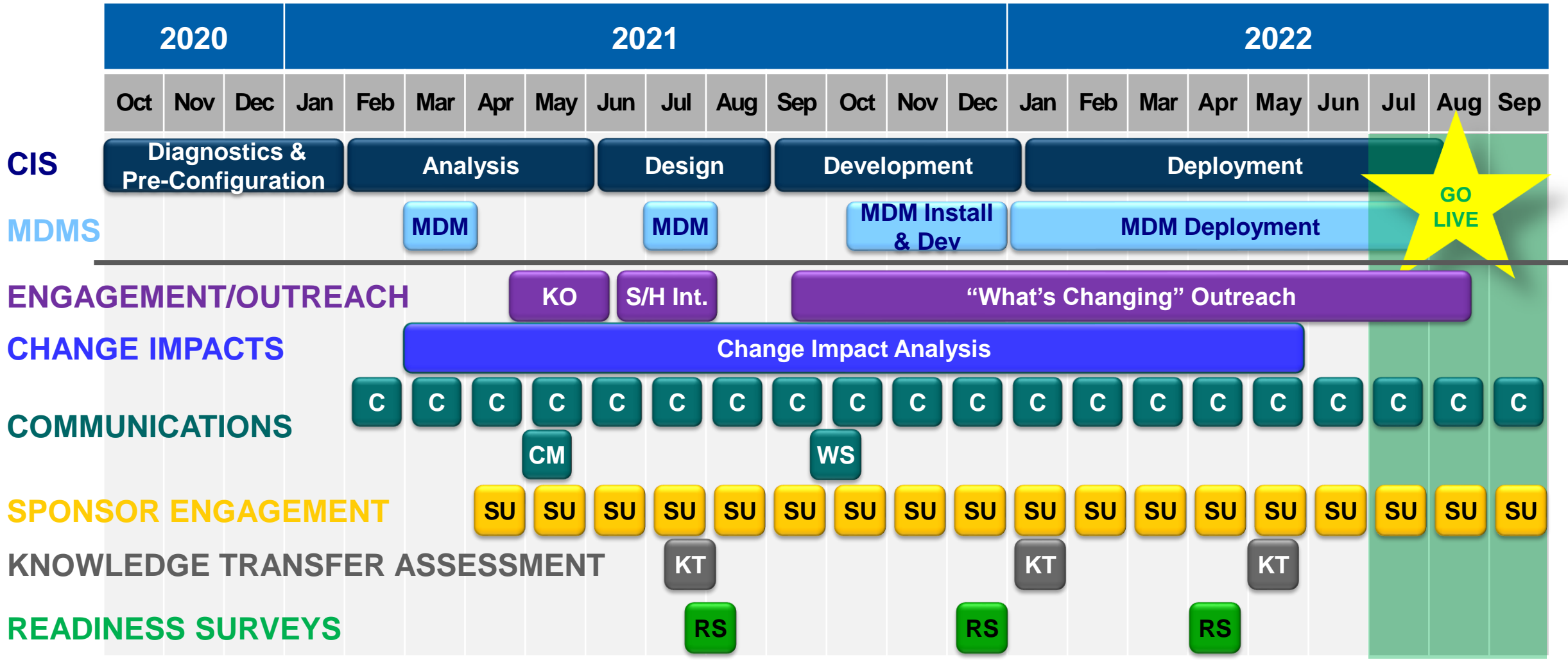
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End User Material Example

NEAT Program: Big Changes!

> The NEAT program is being retired. Customers will still be able to have their payments drafted automatically from their bank accounts, but changes are coming that will make the enrollment easier and more efficient for customers and easier and more efficient for us.

	Today: CIS	Tomorrow: C2M
Customer can enroll entirely online – no enrollment form or voided check to mail in.	✘	✔
Service Advisor can take banking information over the phone and complete the enrollment.	✘	✔
Billing enters banking information into the system and executes the autopayment.	✔	✘
Billing stores enrollment forms and voided checks.	✔	✘

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OCM Activities: Project Lifecycle

	2020			2021												2022								
	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep

CIS: Diagnostics & Pre-Configuration | Analysis | Design | Development | Deployment | GO LIVE

MDMS: MDM | MDM | MDM Install & Dev | MDM Deployment

ENGAGEMENT/OUTREACH: KO | S/H Int. | "What's Changing" Outreach

CHANGE IMPACTS: Change Impact Analysis

COMMUNICATIONS: C C C C C C C C C C C C C C C C C C C C C — CM — WS

SPONSOR ENGAGEMENT: SU SU SU SU SU SU SU SU SU SU SU SU SU SU SU SU SU SU

KNOWLEDGE TRANSFER ASSESSMENT: KT KT KT

READINESS SURVEYS: RS RS RS

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Questions?

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