Organizational Change Management

Readiness Guide

Organizational Change Management Readiness Guide

How This Guide Will Help

KICKSTART YOUR READINESS FOR FI$CAL!

This guide provides California State departments a practical overview of Organization Change Management (OCM) to help prepare your organization for change during transition. The guide focuses on key concepts that will help you prepare your department for the transformational changes of Financial Information System for California (FI$Cal). FI$Cal is a business transformation project for California in the areas of budgeting, accounting, procurement, and cash management.

These next few pages provide descriptions, tools and templates anchored to the five pillars of change; Communication, Readiness, Sponsorship, Stakeholder Management and Training. Take the Readiness Assessment to evaluate your organization's readiness for change and focus on the key areas that will prepare your organization for successful change. Assess your readiness now!

"WE NOW ACCEPT THE FACT THAT LEARNING IS A LIFELONG PROCESS OF KEEPING ABREAST OF CHANGE. THE MOST PRESSING TASK IS TO TEACH PEOPLE HOW TO LEARN." – PETER DRUCKER

Where Do I Start?

RIGHT HERE!

To kick off your readiness for a large scale change such as FI$Cal, follow these three steps:

1. Complete the Readiness Assessment included in this guide.

2. Review your score and recommendations.

3. Follow the recommendations for your organizational readiness planning.

Get Ready for Change!

What is OCM?

IT'S ABOUT THE PEOPLE, PEOPLE

Organizational Change Management (OCM) is an approach to transitioning an organization, its groups and individuals from their current state to a new state. It helps an organization integrate and align people, processes, culture and strategy. It is all about managing the most important part of change...the people. The more mature an organization's change management ability the more comprehensive, structured and cyclical the change process will be. This helps an organization implement change strategically, dynamically and ultimately more successfully.

The topic of OCM is massive, complex, varied and can be intimidating. But like anything else, with some research, hard work, team effort and a great attitude you will be well on your way to managing the changes your organization needs to make your next project a success!

OCM That Fits You

The size and complexity of both your project and your organization determines the components of change you should include in your OCM approach. The Five Pillars of Change are explained on Page 5 but this list shows what pillars you need to concentrate on for your upcoming project size and type.

Small / Simple / Transactional Project

Communication - Sponsorship

Medium / Operational Change Project

Communication-Sponsorship-Stakeholder Management

Large/ Complex / Transformational Project

Communication-Sponsorship-Stakeholder Management Readiness - Training

Readiness Assessment

HOW READY ARE YOU FOR CHANGE? WHAT CAN YOU DO TO IMPROVE?

Instructions:

This Readiness Assessment assists you in evaluating your readiness for change. It may be used in several ways:

1. Self-evaluation, as a way to validate intuitions and feelings about how ready your organization is for change.
2. Hand out the assessment and use it as a discussion topic with the management or work-group teams.
3. Solicit reviews from staff and ask for honest answers, protecting confidentiality. Share results with project stakeholders, such as implementation and business change management teams.

Assessment Scoring

1. Project Manager/Change Manager leading the change effort should take this assessment from an organization perspective, not from his/her individual perspective.
2. Average Score is calculated at each pillar of Organizational Change Management via this Readiness Assessment.
3. Average score below 4.0 for any of these categories indicates that organization is not fully prepared and should spend efforts based on the guidance from that particular section of the guide.
4. For each question, in the column to the right, enter the number that best represents your organization's ability to manage change. Responses are interpreted as follows:

1=Strongly Disagree, 2=Disagree, 3=Neutral,
4=Somewhat Agree, 5=Agree, 6=Strongly Agree

	Communication - Informing who is affected and impacted regarding the change.	**Response: (Enter a Number between 1**
1	The organization has a clearly defined vision and strategy and changes are continually communicated with all stakeholders.	
2	Priorities are set and continually communicated regarding change projects and other competing initiatives.	
3	The organization uses multiple communication methods to keep stakeholders informed.	
4	The organization's messaging about change projects is clear, concise and consistent.	
5	Mechanisms are in place to identify lapses in effective communication.	
	Total Communication Score / 5 = Average Score	

Communication is the foundation and mechanism to build positive organizational change. For more information, tools and templates for developing a solid communication strategy for your change effort see Page 5 Pillar #1: **Communication**.

Readiness Assessment

CONTINUED

	Sponsorship - Ensuring there is active sponsorship for the change at a senior executive level within the organization, and engaging this sponsorship to achieve the desired results.	**Response: (Enter a Number between 1**
6	Change initiatives in the organization have an executive sponsor identified.	
7	The executive sponsor has the necessary authority over the people, processes and systems to authorize and fund change initiatives.	
8	The executive sponsor can build awareness of the need for change (why the change is happening).	
9	The executive sponsor will actively and visibly participate with the project team throughout the entire change process.	
10	The executive sponsor will resolve issues and make decisions relating to the change project schedule, scope and resources.	
	Total Sponsorship Score / 5 =Average Score	

Strong, Supportive Sponsorship can make or break a large scale change initiative**.** Having an engaged, active sponsor is critical to success. For more information, tools and templates for this pillar of OCM see Page 5 Pillar #2: **Sponsorship**

	Stakeholder Management - Gaining buy-in for the changes from those involved and affected, directly or indirectly. Involving the right people in the design and implementation of changes, to make sure the right changes are made.	**Response: (Enter a Number between 1 and 6)**
11	The executive sponsor is willing and able to build a sponsorship coalition for change, and is able to manage resistance from all stakeholders.	
12	Change is managed effectively and change successes are celebrated, both in private and in public.	
13	Stakeholders hear a consistent and unified message from various levels of executives.	
14	Change initiatives are accurately tailored to the particular needs and concerns of each stakeholder group.	
15	Special tactics have been developed for handling resistance to change from various stakeholders.	
	Total Stakeholder Management Score / 5 = Average Score	

Stakeholder Management is the effort to engage key players of your change effort early and consistently during the change cycle. Identifying and managing these relationships often directly correlates to the success of the change effort. For more information, tools and templates see Page 6 Pillar #3: **Stakeholder Management**

Readiness Assessment

CONTINUED

	Readiness - Getting people ready to adapt to the changes by ensuring they have the right information and toolsets.	**Response: (Enter a Number between 1 and 6)**
16	A structured change management approach is being communicated and applied to change projects.	
17	Change management team members have been identified. Managers and staff are trained on Organizational Change Management.	
18	Project team and change management teams are tracking progress and able to resolve related issues through set project management processes. A project plan has been integrated with a change management plan.	
19	Resources for change projects are identified and acquired based on a project plan. Resources have the necessary time to complete work for the change.	
20	Feedback processes are continually used to determine how effectively change is being adopted by stakeholders.	
	Total Readiness Score / 5 = Average Score	

Readiness is the benchmark of successful change. This pillar puts it all together, organizational readiness is about getting an entire group and culture to accept and move forward with change. For more see Page 6 Pillar #4*:* **Readiness** & Page 8: **Readiness in Detail**

	Training - Training the appropriate resources on the change	**Response: (Enter a Number between 1 and 6)**
21	Organization recognizes and reinforces skills and behaviors required for the change effort.	
22	Skills and knowledge needed for transition have been identified.	
23	Skills assessments are continually conducted for change projects and gaps are identified for transition.	
24	Training is developed and scheduled proactively, based on gaps and need assessments.	
25	Flexible methods are employed for training i.e. Web Based, Webcasts, Guides, In Class training etc.	
	Total Training Score / 5 = Average Score	

Training is recommended to understand gaps in skills and provide opportunities to learn new ways of doing business *before* a change is implemented. For more information, tools and templates regarding training for your change effort see Page 7 Pillar #5: **Training**

1. Communication

Communication is the fundamental pillar of change. People crave information and want to know what is going to happen, how, when and why! It is the engagement mechanism for change. Communication helps you frame how your stakeholders are exposed to the change and thereby gives you the avenue for influencing how they view it. Without quality communication your change participants will not have the awareness and understanding they need to commit to and implement your change successfully. By formally setting expectations, employing tools to improve communication and proactively seeking ways to reduce misinformation, stakeholders are more likely to buy into a change initially. They will also stay more committed to the change, ultimately leading to a successful transformation. Good communication should be deliberate and well thought out. Develop your communication strategy in the early stages of planning the change itself. Communicate early, openly, often, through multiple methods and allow for feedback.

Idea: To build on your communication planning for change, review the section titled "Readiness in Detail". Ensure an adequate communication plan and overall strategy is established for your change effort and confirm communication is flowing at all levels in your organization.

Communication Tools and Templates

USE THESE RESOURCES TO GET STARTED TODAY

Category	Artifact Description	Link to the Artifact
Checklist	Communication Checklist	http://www.change-management.com/tutorial-checklist-communication.htm
Worksheet	Communicating a Compelling Vision for Change	http://www.cio.ca.gov/opd/pdf/itla/21/OCM-Communicating-Compelling-Vision.docx
Template	Communications Plan Template	http://www.cio.ca.gov/opd/pdf/itla/21/OCM-Communications-Plan.doc

2. Sponsorship

When change occurs people turn to the organization's leaders for direction and support. Ensure there is active sponsorship for the change at an executive level within the organization, and engage this sponsorship for a successful outcome. A sponsor builds commitment across the organization and particularly at the senior management level.

Sponsors have ultimate responsibility for projects. Success of a project can be directly linked to an active sponsor who champions the change, mitigates change resistance and builds organizational alliances.

Idea: To build on your sponsorship of change, validate that the level of your primary sponsor matches up with the size and type of the change. Determine if the change has the right level of sponsorship before moving ahead.

Sponsorship Tools and Templates

USE THESE RESOURCES TO GET STARTED TODAY

Category	Artifact Description	Link to the Artifact
Checklist	Sponsorship Checklist	http://www.change-management.com/tutorial-checklist-sponsorship.htm
Tool	OCM Change Leadership Review	http://www.cio.ca.gov/opd/pdf/itla/21/OCM-Change-Leadership-Review.doc

3. Stakeholder Management

The primary goals of Stakeholder Management are to accurately identify all stakeholders and make them aware of the change and its benefits throughout the change process. This helps gain and maintain stakeholder buy-in. Much like Sponsorship, actively engaging stakeholders early during the change cycle often directly correlates to the success of the change.

- Perform change activities with stakeholders, not 'to' them.
- Commit to a partnership with your stakeholders.
- It is absolutely critical that those impacted by the change understand the needs for and benefits of the change.

Once you have identified and planned a strategy to engage your stakeholders, ask yourself what else is going on in the organization and what could distract them. Ensure you are able to focus your stakeholders on the change. Strategize and tailor your messaging to the types of stakeholders on the project.

Idea: To build on stakeholder management, conduct a stakeholder analysis with your leadership team. Ensure this analysis is continually revisited and refreshed. Too often, stakeholders are replaced with others that may have a different agenda. Effective stakeholder management provides you the tools to look ahead and anticipate problems before they happen.

Stakeholder Management Tools and Templates

USE THESE RESOURCES TO GET STARTED TODAY

Category	Artifact Description	Link to the Artifact
Work-sheet	Developing a Strategy to Deal with People's Response to Change	http://www.cio.ca.gov/opd/pdf/itla/21/OCM-Developing-A-Strategy.doc
Tool	OCM Job Duty Assessment	http://www.cio.ca.gov/opd/pdf/itla/21/OCM-Job-Duty-Assessment.doc
Tool	OCM Gap Analysis Walkthrough Worksheet	http://www.cio.ca.gov/opd/pdf/itla/21/OCM-Gap-Analysis.doc
Tool	OCM Stakeholder Map	http://www.cio.ca.gov/opd/pdf/itla/21/OCM-Stakeholder-Map.docx
Tool	Stakeholder Analysis	http://www.cio.ca.gov/opd/pdf/itla/21/OCM-Stakeholder-Analysis.docx

4. Readiness

This is a measure of the reality of the current organization in relation to the future state. When determining readiness for change you should consider the culture and history of change in your organization, accountability, resource availability, and availability of staff with change management knowledge and experience. There are two perspectives by which readiness is assessed:

1. The human side of change. Supporting the people and culture involved in the change.

Continued...

Tips and Tricks

Communication

⇒ Create a strong, centralized voice for policy and program coordination, development, implementation and monitoring

⇒ Conduct individual business meetings and brown-bag lunches with various business units to identify concerns and problem areas prior to the transition

⇒ Have on-site representation during the transition time period to answer staff questions and address concerns/issues

Sponsorship

⇒ Engage your executive leadership sponsors to create a strong centralized voice to share the vision (policies and process changes, timelines for change, benefits of change)

⇒ Get sponsor buy-in and agreement

Stakeholder Mgmt.

⇒ Tailor your messaging to the types and styles that most impact your stakeholders.

⇒ Create a decision making framework for the leadership team to use to engage and make decisions with stakeholders.

The Five Pillars of Successful Change

...Readiness Continued

2. It is necessary to document and understand the organizational processes impacted by change. This readies you to migrate from "current state" to "future state" processes. Business Process Modeling allows you to identify processes impacted by the new system, create a baseline for process improvements, increase efficiency in day-to-day operations, educate staff and advance business understanding. See the Business Process Modeling Guide or BPM Quick Start Guide in your packet for more information.

The first perspective is about getting people ready to adapt to change by ensuring they have the right information and toolsets. It is covered more in the Readiness In Detail section on the next page.

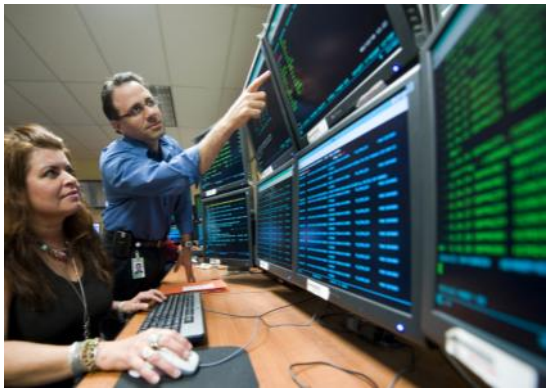
Idea: To build on your readiness, review the section titled "Readiness in Detail" and follow steps 1 thru 5. Ensure you are prepared by advocating a holistic approach to the change effort with your leadership team.

Readiness Tools and Templates

USE THESE RESOURCES TO GET STARTED TODAY

Category	Artifact Description	Link to the Artifact
Worksheet	Planning for Implementation	http://www.cio.ca.gov/opd/pdf/itla/21/OCM-Planning-For-Implementation.doc

5. Training and Turnover



The primary goal of Training in OCM is to understand gaps in stakeholders' skills and provide them opportunities to learn these skills before the change is implemented. A learning solution should be designed to foster understanding, acceptance and commitment, enable all users to work with, and build their confidence in the new processes/systems. Additionally, turnover is a "hidden" cost of change management. Staff turnover is often prevalent and disruptive during a major change effort and can result in reduced employee morale and retention. Engaging staff early and providing adequate training and communication about the change is essential to demystify rumors and opposition in your organizational change initiative. For FI$Cal, the training and knowledge transfer / skill building will help ensure that state department staff have the necessary technical and business knowledge, skills, and abilities to use FI$Cal solutions.

Idea: To build on training in your organizational management strategy, educate your leadership team and change agents in organizational change management methodologies such as ADKAR, as well as the specifics on the change itself. Additionally, to ensure you have planned adequately for staff turnover, create a transition plan that can set the stage for new employees.

Training Tools and Templates

USE THESE RESOURCES TO GET STARTED TODAY

Category	Artifact Description	Link to the Artifact
Tool	OCM ADKAR Assessment Tool Reference	http://www.cio.ca.gov/opd/pdf/itla/21/OCM-ADKAR-Assessment.doc
Tool	SCO Generic Departmental FI$Cal Transition Plan DRAFT	http://www.cio.ca.gov/opd/pdf/itla/21/OCM-Generic-Departmental-Transition-Plan-DRAFT.docx

Readiness In Detail

WHAT YOU CAN BE DOING **NOW** TO GET READY FOR CHANGE?

All five of the change pillars provide insight into the areas of focus for a large scale change to be successful in your organization. So now, what? You know what to focus on, but what can **YOU** be doing to get ready for change *right now*?

Step 1: Assess Your Organization Change Readiness.

Review the assessment results from this guide. If the assessment was taken individually, get your leadership teams and sponsors together and review the results. If you can, vet the assessment with a third party to assist with measuring your change readiness. This could be a vendor or a different area within your organization.

Questions to keep in mind when assessing your OCM Readiness Level
• How well does your organization function during change efforts?
• How well positioned is the organization to be able to absorb all the changes planned without creating significant risk of overload in affected areas?
• What are the resources involved and what is their degree of skills and experience?
• What is your leadership's capability of sponsoring and supporting change?
• What generates desire for the change and what creates resistance to it?
• What do you need to improve support and reduce roadblocks for the change?
• What is your corporate culture and historical experience in dealing with change?

Step 2: Select an OCM Methodology.

Become acquainted with change management techniques and select a methodology for your change project. Use a blend of techniques to best address your organization's culture and specific project needs. There are many to choose from, refer to the "Dive Deeper" section for several methodology selections and resources. Many California State departments are using Prosci's ADKAR training for their leadership teams.

Step 3: Start Planning, Select your Team Size & Strategy.

Discuss the information in this guide with your leadership team and develop a charter and communication plan for the change effort. Be prepared for a significant workload adjustment and priority discussion. Plan to spend 10-20% of your project budget on readiness planning. Select team size and strategy. Identify and ensure legacy and key subject matter staff are assigned as change agents for managing resistance. Involve people from all areas of the organization. Plan early and embrace the change. Communicate consistently at all levels of your organization including the benefits and "WIIFM" (What's in it for me?)". Implement ways to measure readiness.

Step 4: Review the Business Process Modeling (BPM) Guide.

Remember that there are two perspectives to readiness. For the systems and processes perspective there is a separate guide in your packet. The Business Process Modeling (BPM) Guide teaches you a repeatable process to identify as-is business processes and provides guidance for assessing your readiness for process change. Create a baseline for process improvements. Identify ways to increase efficiency in day to day operations. Get started now by reviewing the BPM Guide included in this packet.

Step 5: Be Prepared for the FI$Cal Change Management Team!

Review the remaining sections of this guide. Identify the common challenges from previous wave departments. Dedicate time and energy into planning for change *now* so that you are ready for your FI$Cal wave kick off!

Tips and Tricks

Readiness

⇒ Complete the Readiness Assessment

⇒ Conduct Business Process Modeling(BPM) See **BPM Quick Start Guide**

⇒ If you have a Gartner subscription: ITScore for Business Process Management, 2013

Training

⇒ Ensure you have planned adequately for staff turnover, create a transition plan that can set the stage for new employees

⇒ Identify roles, skill building requirements, training classes and establish a comprehensive training plan

OCM Methodologies

⇒ PROSCI / ADKAR
http://www.prosci.com/

⇒ 4 Change Mgmt. Strategies
http://www.nickols.us/four_strategies.pdf

⇒ Change Management 101
http://www.nickols.us/change.pdf

And Remember ...

⇒ Celebrate your successes

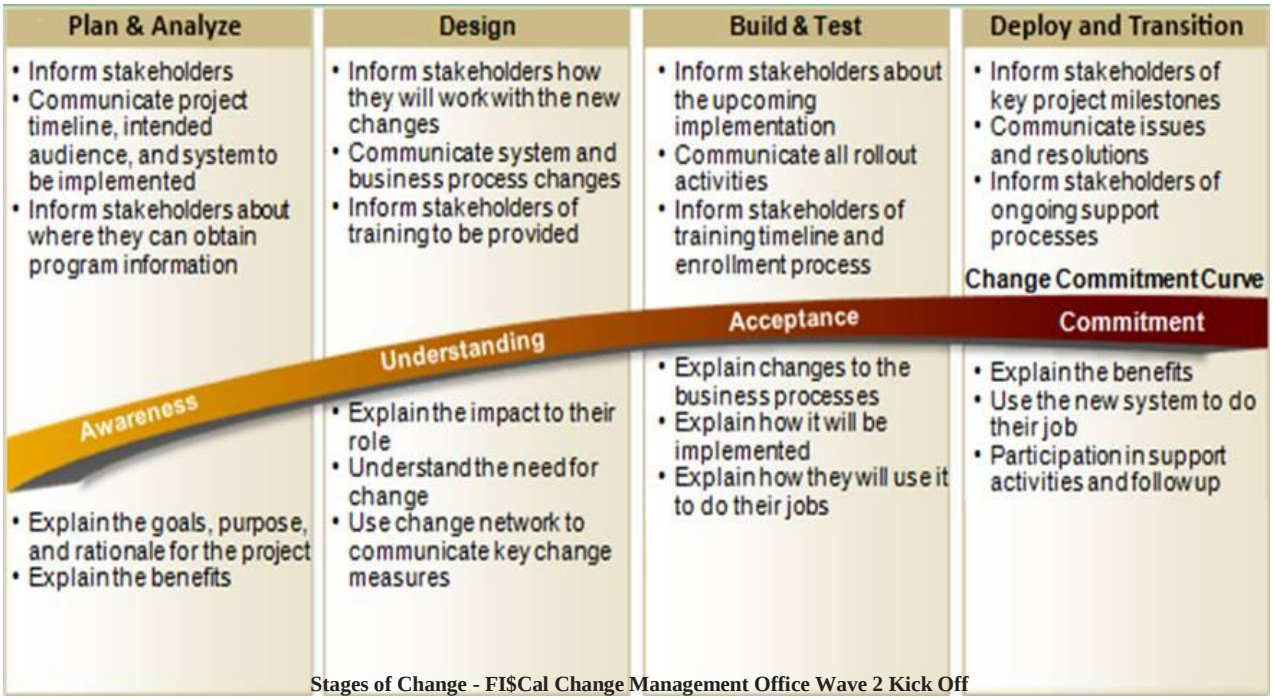
⇒ Keep the organization motivated during challenges

Stages of Change

GENERATE AWARENESS AND GAIN COMMITMENT

You know that the change needs to happen, but you don't really know how to go about delivering it. Where do you start? Whom do you involve? How do you see it through to the end? Begin your OCM program early. Using a time based approach to provide the right information, to the right people, at the right time, in the right way. The Stages of Change maps the process of awareness, understanding, acceptance and commitment to the phases of a project's lifecycle. In the planning phase of your project generate awareness about the change, providing project specific information and explain the goals and purpose of the change. In the design phase help people understand the impacts of change by communicating decisions made and informing people how they will work with the change.

During the build/test phase of your project communicate the changes to the impacted business processes, clarify roles, discuss the implementation approach, determine training needed to build the skills required, communicate the timeline and planned rollout activities. Also, during the deployment and transition phase inform stakeholders of key milestones, provide ongoing support processes, encourage participation, celebrate successes and communicate issues and resolutions timely. Make continuous efforts to ensure that the change is seen in every aspect of your organization. This will help give that change a solid place in your organization's culture.



Stages of Change - FI$Cal Change Management Office Wave 2 Kick Off
http://www.fiscal.ca.gov/documents/W2_Analyze_Kickoff_forDepts_v2.pdf

Make Change Stick!

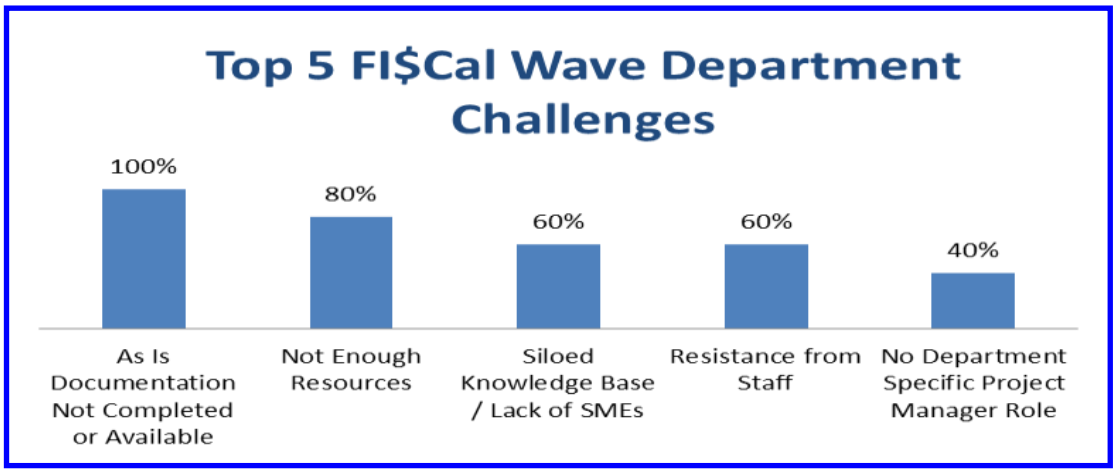
FOLLOW THROUGH AND SUSTAIN CHANGE

One of the greatest challenges with any change initiative is following through and sustaining the change. It is too easy for an organization to fall back into old habits. Remember, it takes time and diligence to change organizational behavior. Clear, consistent, positive reinforcement of desired behaviors is the best way to effect a change in the way people do things.

To sustain the change, you need to use positive reinforcement of the new habit continues long after the initial change is completed. Be ready to implement and reinforce that next big change. Avoid the "One and Done", Make Change Stick!

FI$Cal Wave Challenges and Advice

"THE GREATER THE OBSTACLE, THE MORE GLORY IN OVERCOMING IT." -MOLIÈRE



As Is Documentation Not Completed Or Available:

⇒ Unanimously, all Wave Departments interviewed agreed that they could have been more prepared in documenting and/or updating their 'As Is' financial management processes prior to the start of the business process workshops for FI$Cal. Without a documented understanding of your current state processes, the impacts of FI$Cal on your organization cannot be fully determined. Furthermore, your resources will be on 'double duty' preparing and implementing at the same time.

Idea: Review the Business Process Modeling Quick Start Guide to understand how to hit the ground running on documenting your 'AS IS' Business Processes to be prepared in advance of the FI$Cal Business Process Modeling Workshops and Role Mapping Activities.

Not Enough Resources & Siloed Knowledge Base / Lack of SMEs:

⇒ Wave Departments also strongly encourage future wave departments to not underestimate the amount of dedicated resources that the FI$Cal change effort will require of your organization. In fact, all Wave 1 departments cited that they underestimated the amount of Subject Matter Experts and staff that will be required full time during the implementation.

Idea: Review your current portfolio of projects and workloads *now*. Attend a FI$Cal Forum or a Customer Impact Committee meeting to understand the scope and character of FI$Cal. Inform your stakeholders of the impending workload adjustments to come and begin assembling your team of experts to analyze your current financial management systems and processes.

Resistance from Staff and No Department Specific Project Manager Role:

⇒ Wave Departments cited a greater need for department specific change management plans for the FI$Cal change initiative. Department specific change management plans will enable the organization to determine the proper methods to manage the perception of the change with staff and management. Avoid the negative, avoid the resistance, turn the challenge into an opportunity. Additionally, several Wave Departments cited that they required a department level project manager role to manage the schedule of the effort.

Idea: Discuss this guide with your leadership teams. Select a change management methodology and strategy *now* for your department. FI$Cal is now recommending future wave departments to assign a department project manager role to the change effort. The FI$Cal change management office is here to support <u>you</u>. Be sure to maintain contact with your readiness coordinator!

Source: Interviews conducted with Board of Equalization, California Health and Human Services Agency SWAT, State Controllers Office & the Agricultural Labor Relations Board.

What Other Wave Departments Suggest

HIGHLIGHTS OF THE LESSONS LEARNED FROM PREVIOUS WAVE DEPARTMENTS

Communication:

⇒ "Attend FI$Cal Forums and Customer Impact Committee meetings prior to the start of your Wave. There is a lot of great information provided by FI$Cal."

⇒ "Create a department specific communication plan to proactively address risks and mitigate issues promptly with your sponsors for the FI$Cal Project."

⇒ "Meet with other wave departments for lessons learned."

Sponsorship:

⇒ "Create a department specific charter to outline the objectives, model and specific roles and responsibilities of your department for FI$Cal."

⇒ "Create a risk management strategy and risk / decision logs for sponsors to review and take action."

⇒ "Sponsors should consider assigning senior level change agents to allow for the most influence over outcomes and resistance management."

Stakeholder Management:

⇒ "Identify change agents within your organization who see the big picture and can mitigate resistance with staff and stakeholders."

⇒ "Document outcomes / success factors. Celebrate successes and early wins with stakeholders to generate buy-in."

⇒ "Ensure all stakeholders are aware of the change and the outcomes / benefits throughout the change process."

Readiness:

⇒ "Document / gather your "As Is" business process information in the areas of budgeting, accounting, procurement, and cash management. This will provide a baseline for your "To Be" business process definitions, role mapping and gaps analysis."

⇒ "Establish readiness team structure and resources today! You will need to plan for dual workloads and a significant amount of time with current business process subject matter experts; ensure legacy staff are included."

⇒ "Consider hiring limited term resources as backups to subject matter experts during the change project" *(For Large Departments).*

⇒ "Evaluate your current department/agency workload and portfolio of work."

⇒ "Create a department specific level project plan and own it at a department level. Track the detailed department level tasks."

⇒ "Consult with your agency about creating a collaborative agency partnership and response team (i.e. SWAT team) for agency departments similar to California Health and Human Services."

Training … and Turnover

⇒ "Train your leadership teams and key change agents in Organizational Change Management. This will allow for increased awareness and efforts to curb resistance."

⇒ "Turnover is inevitable during a large scale change project. In order to mitigate it create a department specific transition plan, providing an overview of the FI$Cal impacts to your department. Provide this to newly assigned resources to digest."

Source: Interviews conducted with Board of Equalization, California Health and Human Services Agency SWAT, State Controllers Office & the Agricultural Labor Relations Board.

Dive Deeper

OCM REFERENCES, YOU CAN'T READ JUST ONE

Below are some resources and best practices material for your organization to dive deeper into the subject of Organizational Change Management.

Gartner Reference Materials (www.gartner.com)

- Organizational Readiness Guidelines for BPM
- Getting started With BPM, Part 1: Assessing Readiness
- Getting Started With BPM: Are You Ready?
- 10 Best Practices in Organizational Change for Project Managers
- Gartner IT Score

**Subscription to Gartner for IT Professionals required.*

Maturity Assessments and Models

- Who's Ready for Whole System Change? - http://proactionassociates.com/site_ProAction/section_publications/PDFs/PRO_article_WhosReadyChangeReadinessChecklist.pdf
- OCM Maturity— https://www.change-management-institute.com/sites/default/files/CMI%20White%20Paper,%20Change%20Agility%20-%20Feb%202012_1.pdf
- Prosci OCM Maturity http://www.prosci.com/ecm1/maturity-audit/

Methodology Research and OCM Best Practices Research

- Prosci / ADKAR http://www.prosci.com/
- Free Management Library http://managementhelp.org/
- Four Change Management Strategies http://www.nickols.us/four_strategies.pdf
- Change Management 101 http://www.nickols.us/change.pdf

Change Management Literature

Kotter, John P. *Leading Change*. Boston, MA: Harvard Business School, 1996. Print.

Conner, Daryl. *Managing at the Speed of Change: How Resilient Managers Succeed and Prosper Where Others Fail*. New York: Villard, 1993. Print.

Bridges, William. *Managing Transitions: Making the Most of Change*. Reading, MA: Addison-Wesley, 1991. Print.

Change Management Training

- Prosci ADKAR Training is available at College of Continuing Education and Sacramento State: www.cce.csus.edu

OCM Templates and Maturity Audit Packages *(For Purchase)*

- Prosci CM Pilot Professional http://www.change-management.com/cm-pilot.htm
- Prosci Maturity Model Audit http://www.prosci.com/ecm1/maturity-audit/

OVERALL READINESS TOOLS FOR YOU TO GET STARTED TODAY

Category	Artifact Description	Link to the Artifact
Worksheet	Leading People Through Change	http://www.cio.ca.gov/opd/pdf/itla/21/OCM-Leading-People-Through-Change.docx
Assessment	Readiness Assessment—MS Word	http://www.cio.ca.gov/opd/pdf/itla/21/OCM-Readiness-Assessment.docx
Assessment	Readiness Assessment—MS Excel	http://www.cio.ca.gov/opd/pdf/itla/21/OCM-Readiness-Assessment.xls
Guide	Business Process Modeling Guide	http://www.cio.ca.gov/opd/pdf/itla/21/BPM-Readiness-Guide-v1.PDF
Guide	Business Process Modeling Quick Start Guide	http://www.cio.ca.gov/opd/pdf/itla/21/BPM-Quickstart-Guide-v1.PDF
All	Entire Readiness Packet	http://www.cio.ca.gov/opd/pdf/itla/21/Readiness-Packet.Zip

Stephen Adams	Gary Cannon	Laura Klein	Mary Shear
Elizabeth Bourrage	Jessica Chin	Suzanne McBride	Manpreet Sidhu
Jeanette Brazil	Joy Guzman	Jacquelyn Moore	David Williams
Denise Browne	Jacob Johnson	Tim Paulsen	Patrick Yim

The Information Technology Leadership Academy is a year-long program for state IT managers with a focus on developing leadership skills. Participants in the academy are selected candidates from state agencies and departments that work in information technology programs. Individuals with a vision for enterprise-wide thinking, strong potential for career advancement, and experience carrying out their organization's mission and vision are ideal candidates for acceptance into this program.

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