Executing a successful stakeholder engagement plan in a Fortune 100 organization during global transformation

Lisa Nielsen | ODN 2014

Technology & Tools | Change & Agility | Diversity & Culture

Objectives for today's session

- **Learning Objectives**:
  - How to plan for stakeholder engagement across a global, federated organization with over 3,000 impacted stakeholders

  - Top five lesson's learned on how to execute a successful deployment of the stakeholder engagement strategy

  - How to measure stakeholder engagement supports trends to mitigate against adoption risks

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Assessment findings
Stakeholder Engagement, Impact & Readiness, and Training

- ○ Establish a clear vision and case for change
- ◑ Complete stakeholder analysis
- ◑ Engage leadership teams
- ◑ Establish change agent network
- ◑ Design User Acceptance Testing
- ● Develop communication plan
- ● Identify delivery channels

- ○ Develop and deploy Change Impact Analysis
- ○ Manage Change Impact Action Plan
- ○ Develop and deploy Change Readiness Assessment strategy
- ○ Develop and deploy stakeholder Pulse Check
- ◑ Identify and track change success metrics
- ◑ Provide input to post implementation support plan

- ○ Identify training development and delivery coverage
- ○ Identify trainees
- ○ Create logistics strategy
- ◑ Identify environment and use access
- ◑ Identify and train instructors
- ● Map training roles
- ● Design training curriculum
- ● Identify delivery channels

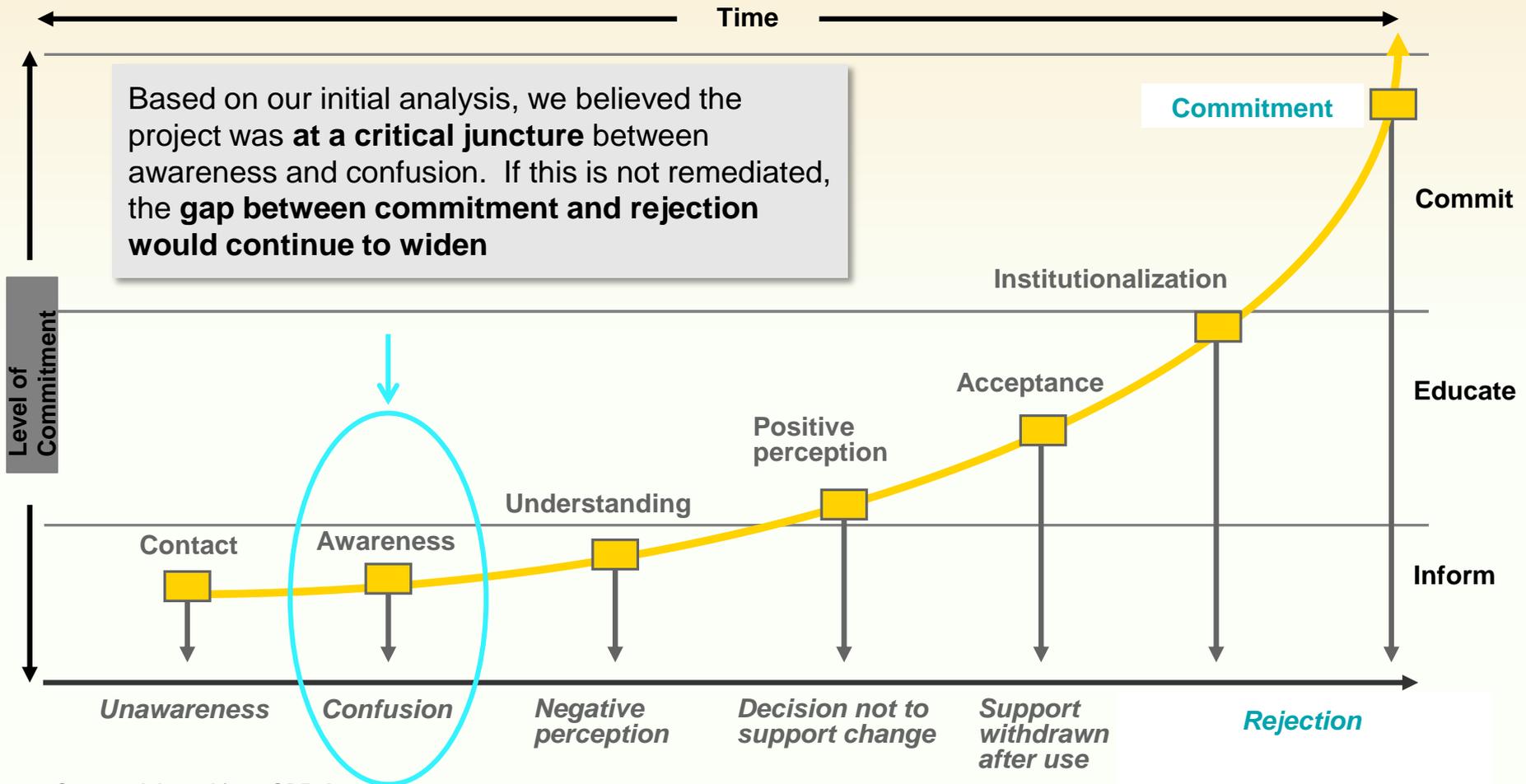**Current state of Change Support Activities**

● Currently Exists   ◑ Partially Exists   ○ Does not exist

Organization Development Network
Advancing the Practice and Theory of OD
50TH ANNIVERSARY

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It is easy to underestimate the importance of building commitment to change

Time

Based on our initial analysis, we believed the project was **at a critical juncture** between awareness and confusion. If this is not remediated, the **gap between commitment and rejection would continue to widen**

Level of Commitment

Commitment

Commit

Institutionalization

Educate

Acceptance

Positive perception

Understanding

Inform

Contact

Awareness

Unawareness

Confusion

Negative perception

Decision not to support change

Support withdrawn after use

Rejection

Source: Adapted from ODR, Inc.

Immediate action
Our very first intervention was to work with the team to identify the value drivers, the 'why,' of the project

Current state poses…

Business Challenges

Lack of visibility into enterprise-wide state of compliance

Little to no accountability or consistency in periodic compliance checks

Costly and distracting swat team construction for audit preparation and post audit remediation

Nonintegrated Legacy systems causing time-consuming, manual workflows

Future State…

Creates visibility into the **enterprise state of compliance**

Provides a **single source** for gap findings, remediation evidence, and exception requests

Provides enhanced **near-real time reporting** and standardization of metrics

Promotes **end user accountability** and reduction of costly pre-audit swat teams

Enables **increased resourcing efficiency** and supports to proactive compliance

High level strategy
The remainder of the change strategy was made up of three workstreams to support commitment to the GRC program

Change Workstreams	Workstreams drive commitment through…
1 Stakeholder Engagement and End-user Communications	▪ Identifying and addressing key stakeholder's concerns will produce visible leadership commitment ▪ Communicating to help build understanding of and commitment to change among impacted audiences
2 Impact and Readiness	▪ Identifying change impacts, risk areas and readiness activities will enable smooth transition and improved commitment to future state ▪ Tracking key metrics will provide the change team early visibility into business readiness and user adoption so they can alter plans to drive greater commitment
3 Training	▪ Training will enable end users to develop the behaviors, skills, capabilities and knowledge required to effectively perform new ways of working

Each workstream was detailed in subsequent sections of the strategy regarding its key activities, principles of approach and development areas

Engagement strategy
Building a holistic stakeholder engagement strategy to cover all strata of the organization from the CIOs to the end-user

CIOs and DRB

Stakeholder Engagement Activities

- **CIO meetings**: 1:1 meetings held with Decision Executive to gain CIO commitment to deploy by Q2 2016

- **DRB meetings**: 1:1 and group meetings to oversee progress of the GRC project and approve phase gates and go live

Advisory Council: *20 Regional IT Managers across all OpCos*

Deployment Coordinator Network: *92 IRM Coordinators*

Stakeholder Engagement Activities

- **Advisory Council & Change Agent Network meetings**: a forum to provide the Core Team feedback and explain deployment tasks

- **Usability Testing**: Validate the ease of use and intuitive nature of the User Interface

- **Live demo and Impact Analysis**: Review tool functionality; capture impact data on what is changing for training

- **Functionality Walk-throughs:** Walk-through of Archer GRC functionality and new processes

End Users: *Approximately 3,500+ across the company globally*

Stakeholder Engagement Activities

- **Functionality Walk-throughs:** Walk-through of Archer GRC functionality and new processes

- **Usability Testing**: Validate the ease of use and intuitive nature of the User Interface

- **Awareness Sessions:** Pre- go live presentations to introduce Archer GRC, direct users to training and where to get help after go live
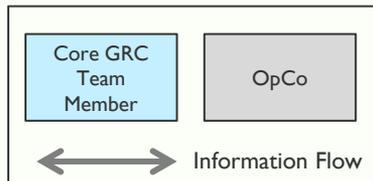
Change Agent Network

Change Agents need to communicate in all directions as they receive project information and provide feedback from their stakeholders

- Interacts with CIO to **gain commitment** to support GRC program

- Provides overview to IT Managers and **passes feedback to change team**

- The **source of content** for both end-user comms and key stakeholder engagement
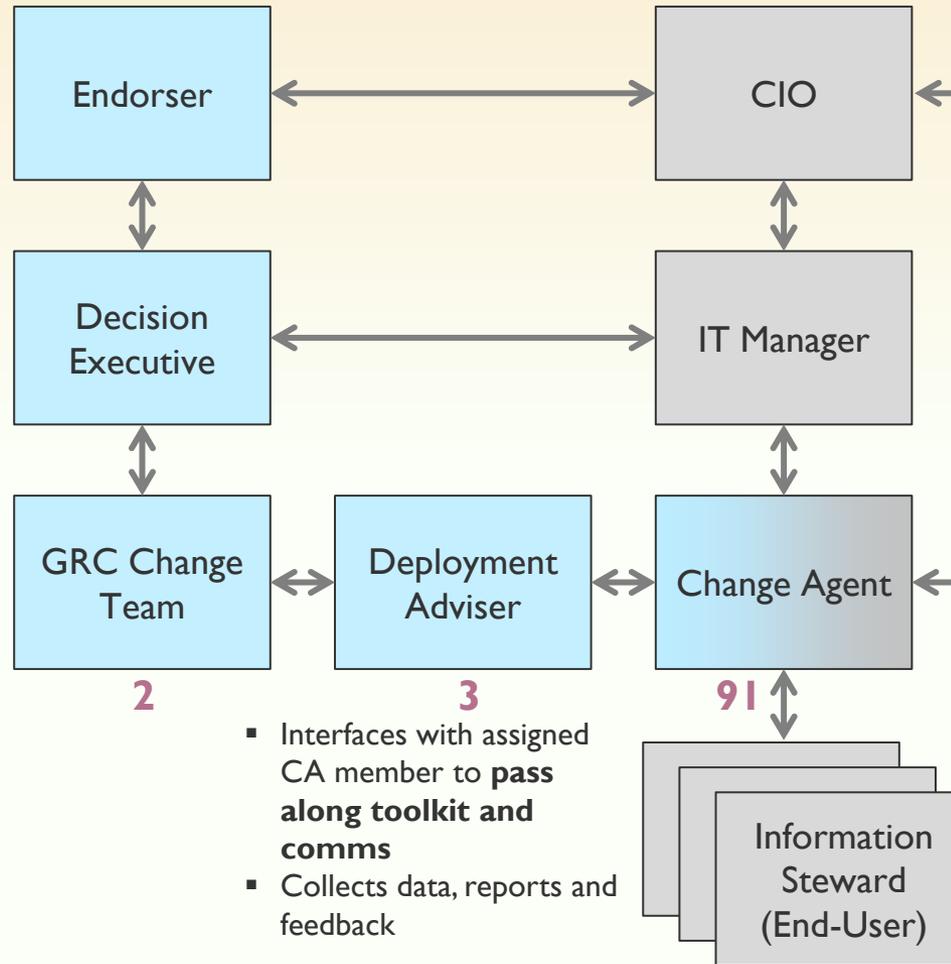
| Endorser | ⟷ | CIO |

- Receives business case information from Endorser
- Interacts with IT Managers to **relay support** and discuss program issues

| Decision Executive | ⟷ | IT Manager |

- Receives **high-level info** from Decision Executive
- Interacts with CA for detailed report and escalates issues to CIO as needed

| GRC Change Team | ⟷ | Deployment Adviser | ⟷ | Change Agent |

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- Communicate **GRC project information down** to Information Stewards, **across** to other IRM Coordinators and **up** to their IT managers/CIO's

- Interfaces with assigned CA member to **pass along toolkit and comms**
- Collects data, reports and feedback

Information Steward (End-User)

3,000

- Receives information and training from CA
- **Provides feedback**, metrics and data

Legend:
- Core GRC Team Member
- OpCo
- ⟷ Information Flow

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