

Agenda

Value of the Change Scorecard

Case Study impact at Fraser Health

Science + Art structure and application

Prosci's Change Scorecard is a powerful framework and tool that I believe is a **difference-maker for me, my organization and our strategic change practice**. It's become essential to my practice. As a change leader, it pulls together the tenets, methodology, and tools **making application easy and purpose-driven**.

By facilitating the dialogue to define and monitor the Change Scorecard, project and change leaders are able to **slice through complex changes** and lead with greater **clarity, focus and alignment** on results.

Most importantly, the Prosci Change Scorecard gave me **a tool to tell the story** of how the change is progressing with the data to back it up. Sponsors no longer need to rely on anecdotal information, or worse, find out way too late that the change is off-course. Our **Sponsors are listening, gaining insight and taking positive actions** in support of the people-side of change in a way they've never before. It is generating more sponsorship of change management in my organization and proving that change management is a **worthwhile and necessary investment!**



Lisa M. Kempton, CCMP
Leader, Strategic Transformation Team, Fraser Health



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Lisa M. Kempton, CCMP
Leader, Strategic Transformation Team, Fraser Health



Don't miss Lisa at ACMP
2018 in Las Vegas!

Tuesday, March 27
2:45-3:45 p.m.
Room: Neopolitan 1

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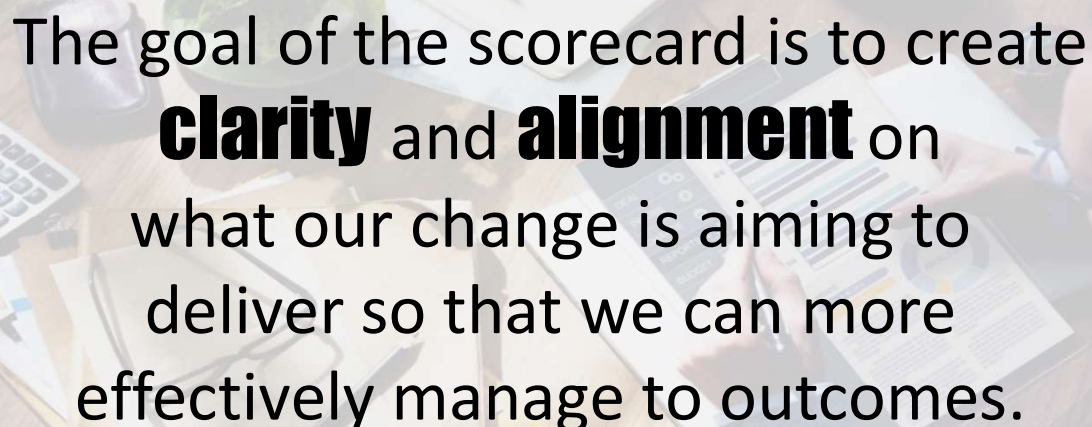
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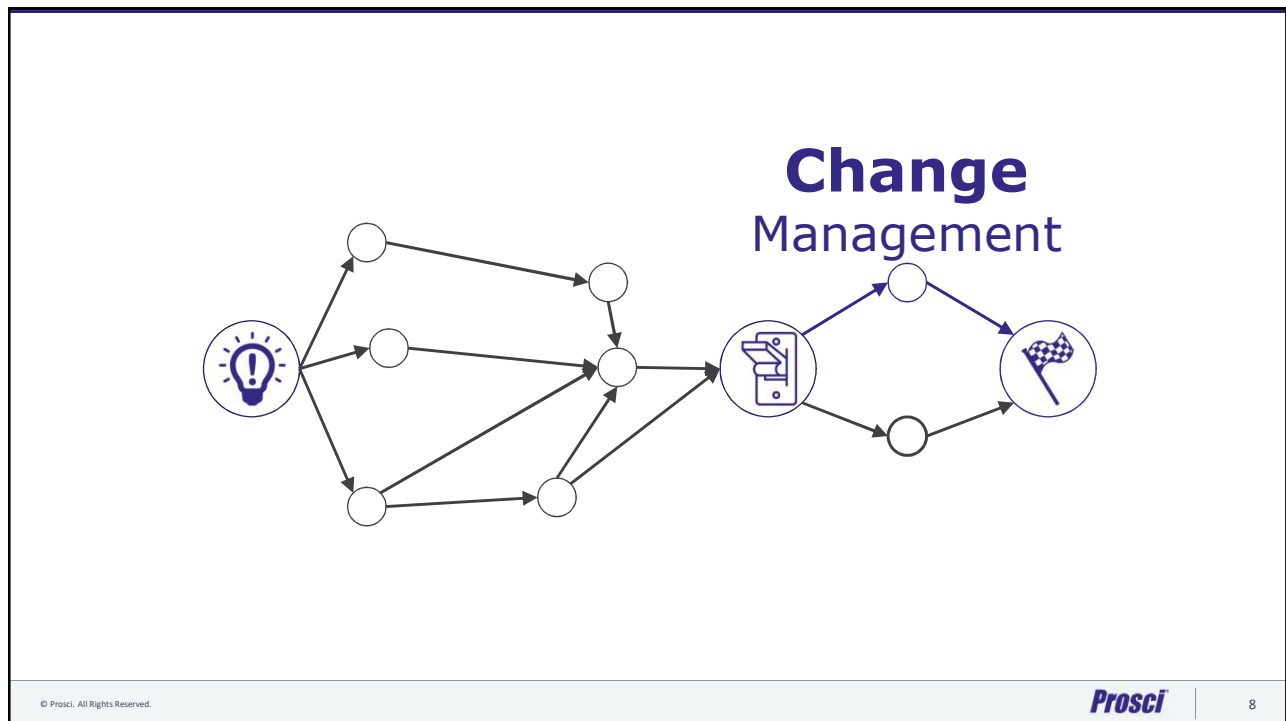
Value of the Change Scorecard

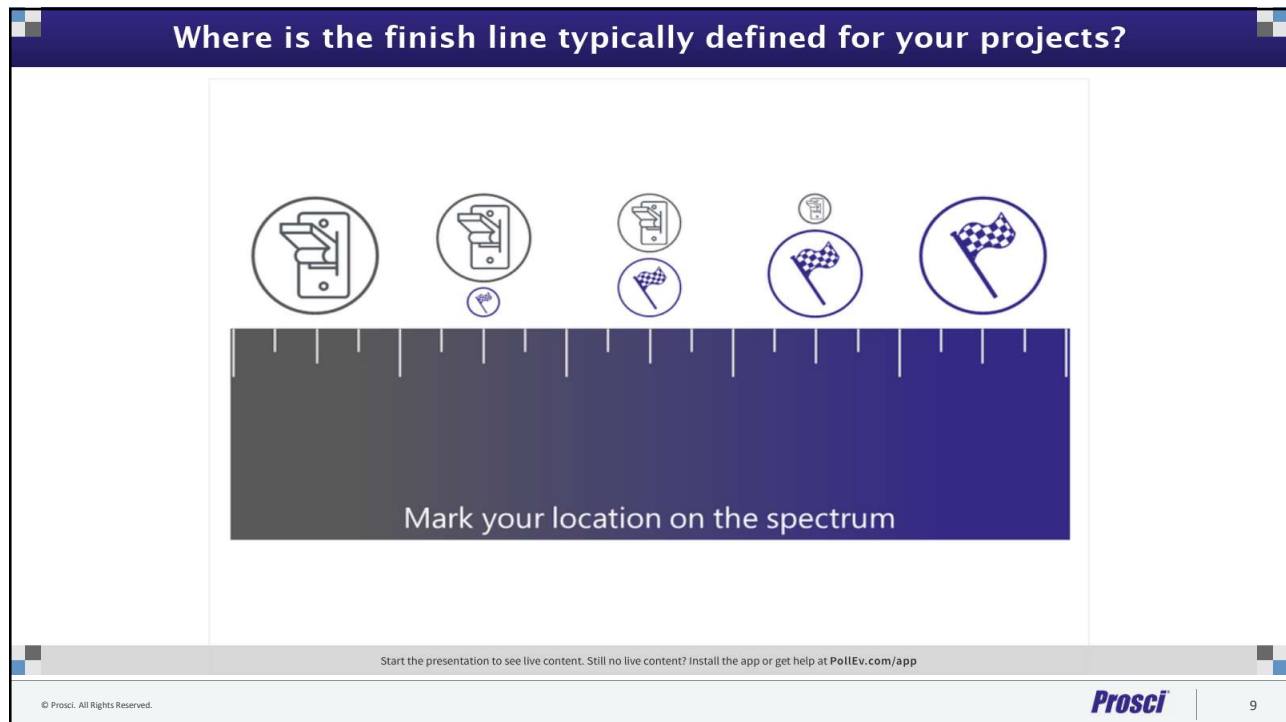
Case Study impact at Fraser Health

Science + Art structure and application

A person is working at a desk. On the desk, there is a laptop, a calculator, a coffee cup, and some papers. The person is looking at the laptop screen.

The goal of the scorecard is to create
clarity and **alignment** on
what our change is aiming to
deliver so that we can more
effectively manage to outcomes.



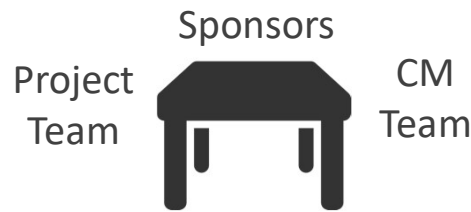


Why are we changing?

Requirements	→	Results
Outputs	→	Outcomes
Specifications	→	Sustainment
Installation	→	Realization*
Solutions	→	Benefits

* Daryl Conner

Engagement to Create Shared Definition of Success



*Why are we
changing?*

*What is our
finish line?*

*How do we
define success?*

*What does “done” mean?
How would we know?*

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Alignment is the necessary condition
before empowering the individual will
empower the whole team.

Empowering the individual when there
is a relatively low level of alignment
worsens the chaos and makes
managing the team even more difficult.

Peter Senge

Word that describe the impact of having alignment around outcomes.

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With alignment on where we are going....



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Without alignment....

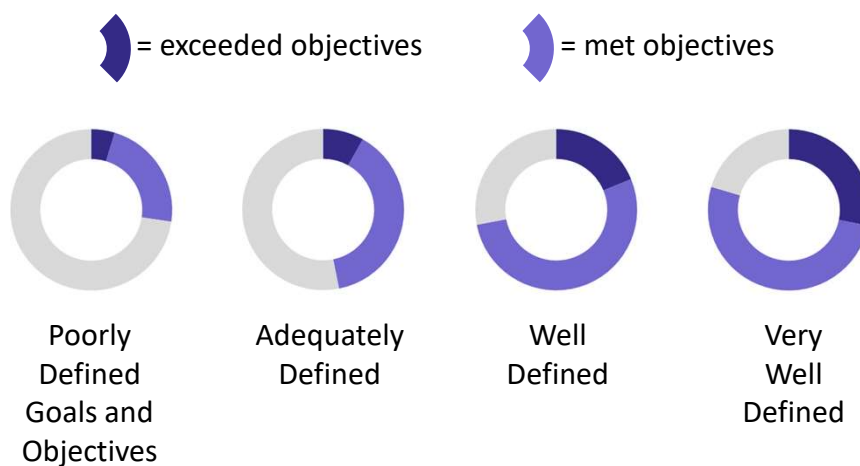


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Definition of Goals and Objectives Drives Results



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Prosci Change Scorecard Value Summary

Clarity	Alignment	Focus
<ul style="list-style-type: none">✓ Make application easy and purpose-driven✓ Slice through the complexity of change✓ Tell the story of change progress with data and tools✓ Get sponsors to listen and taking positive action✓ Demonstrate CM is worthwhile and necessary		

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Which value statement is most intriguing for you

Make application easy and purpose-driven	
Slice through the complexity of change	
Tell the story of change progress with data and tools	
Get sponsors to listen and take positive action	
Demonstrate CM is worthwhile and necessary	

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Science + Art structure and application



Integrated Plan of Care (IPoC) Enables Clinicians to Document Electronically for Better Care

12 Hospitals

First Site Live
Nov 2016

1200
Impacted professionals

Abbotsford Regional Hospital
Cares for
330,000 people



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Better health. Best in health care.

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Integrated Plan of Care Change Scorecard

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Better health. Best in health care.

Organizational Performance - did the initiative deliver expected RESULTS and OUTCOMES?		
Define Define Success <i>results and outcomes</i> 4.1	Track Progress to Plan <i>date: 1/1/17</i> 4.0 	Deliver Value Realization Metric 1: 5 = Ahead of target Metric 2: 3 = Behind target Metric 3:
PCT Assessment <i>date: 1/1/17</i> LS: 22.1 PM: 23.8 CM: 21.8		
Individual Performance - did individuals ADOPT and USE the change?		
Define Define Impact <i>who is impacted/how</i> 4.4 	Track ADKAR Assessment <i>date: 1/19/17</i> average score: A 4.0 D 3.3 K 4.0 A 3.8 R 3.8 barrier points: 25% 25% 0% 0% 0% 50%	Deliver Adoption, Utilization, Proficiency Adoption: 4 = On target Utilization: 3 = Behind target Proficiency: 5 = Ahead of target
Change Management Performance - did we effectively APPLY change management?		
Define Define CM Approach <i>methodology/resources/budget</i> 3.9 	Track Progress to Plan <i>date: 1/1/17</i> 4.0 	Deliver CM Application Effectiveness Metric 1: 4 = On target Metric 2: 4 = On target Metric 3:
Best Practices Audit <i>date: 1/1/17</i> Sp: 3.9 Emp: 3.9 App: 4.4 Comm: 4.0 Res: 3.4 Mgr: 4.1 Int: 4.0		

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“

The Change Scorecard gave us the objective data we needed to make decisions and feel confident about the change. It increased our ability to be responsive to the needs of our people.

—

Megan Stowe
Chief Clinical Information Officer
Fraser Health




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Change Practitioner Perspective



1. Makes the application of Prosci's methodology easier and purpose-driven.
2. Engaging the project team and sponsor to co-create the scorecard leads to greater clarity, alignment and focus.
3. Illustrates the story of how the change is progressing with the data to back it up.
4. Increases commitment to change management activities because it demonstrates the connection between activities and results.



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Value

of the Change Scorecard

Case Study

impact at Fraser Health

Science + Art

structure and application

Science + Art of the Change Scorecard	
Science Structure	Art Application
<ul style="list-style-type: none">• Big questions• Connections• Research foundation• Outcome + Activity• Structure (3x3)• Diagnostic tools	<ul style="list-style-type: none">• Readiness (assessment)• Definition of results and outcomes• Facilitating difficult conversations• Stakeholder engagement• Application process• Zoom
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Three Big Question

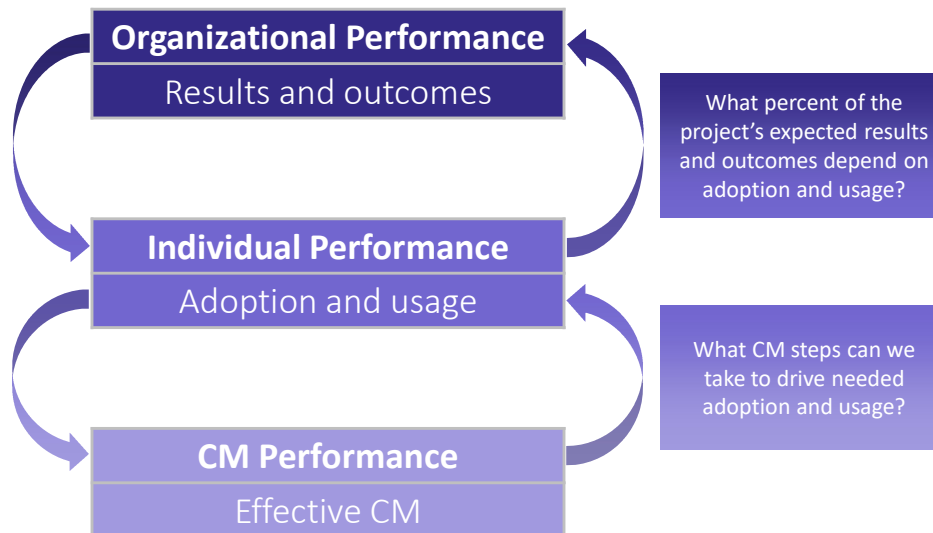
Organizational Performance	Results and outcomes
Did the initiative deliver what was expected?	
Individual Performance	Adoption and usage
How effectively did impacted individuals adopt and use the change?	
Change Management Performance	Effective CM
How well did we “do” change management?	

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Connections



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Prosci Change Scorecard Based on the Research Measurement Research Questions

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

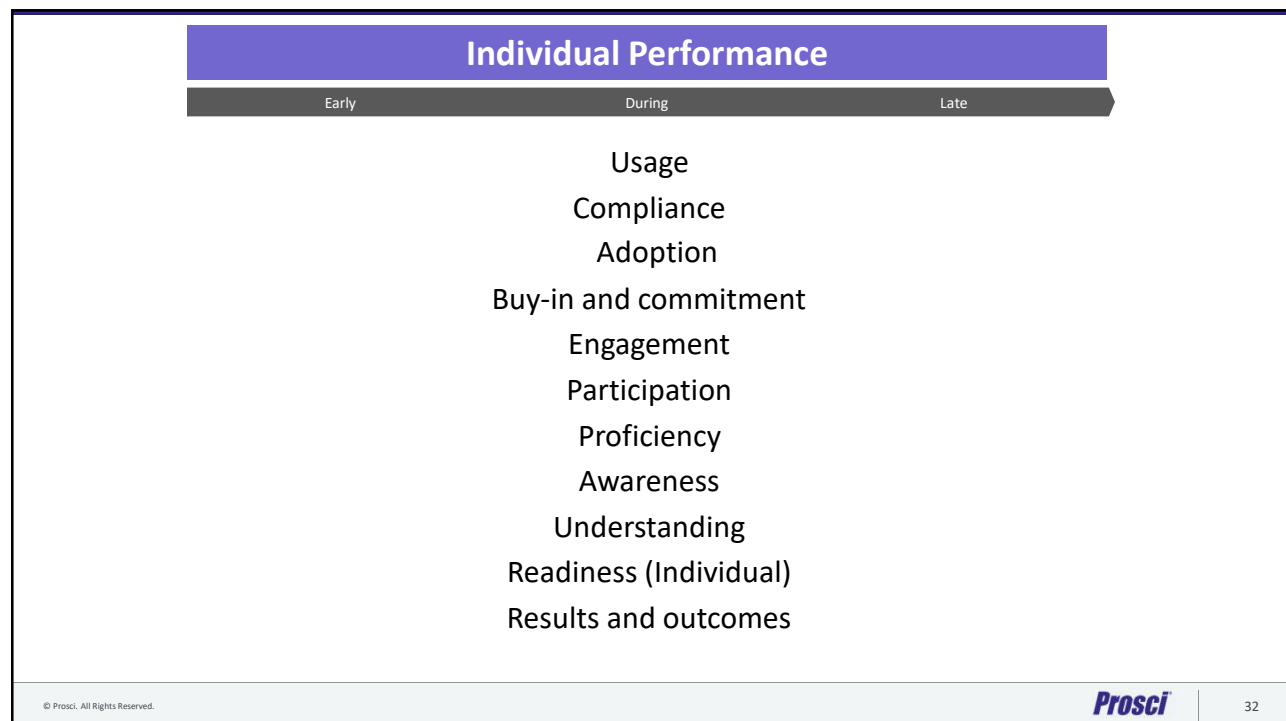
Did you measure whether the change was occurring at the **individual level**?
What metrics did you use?

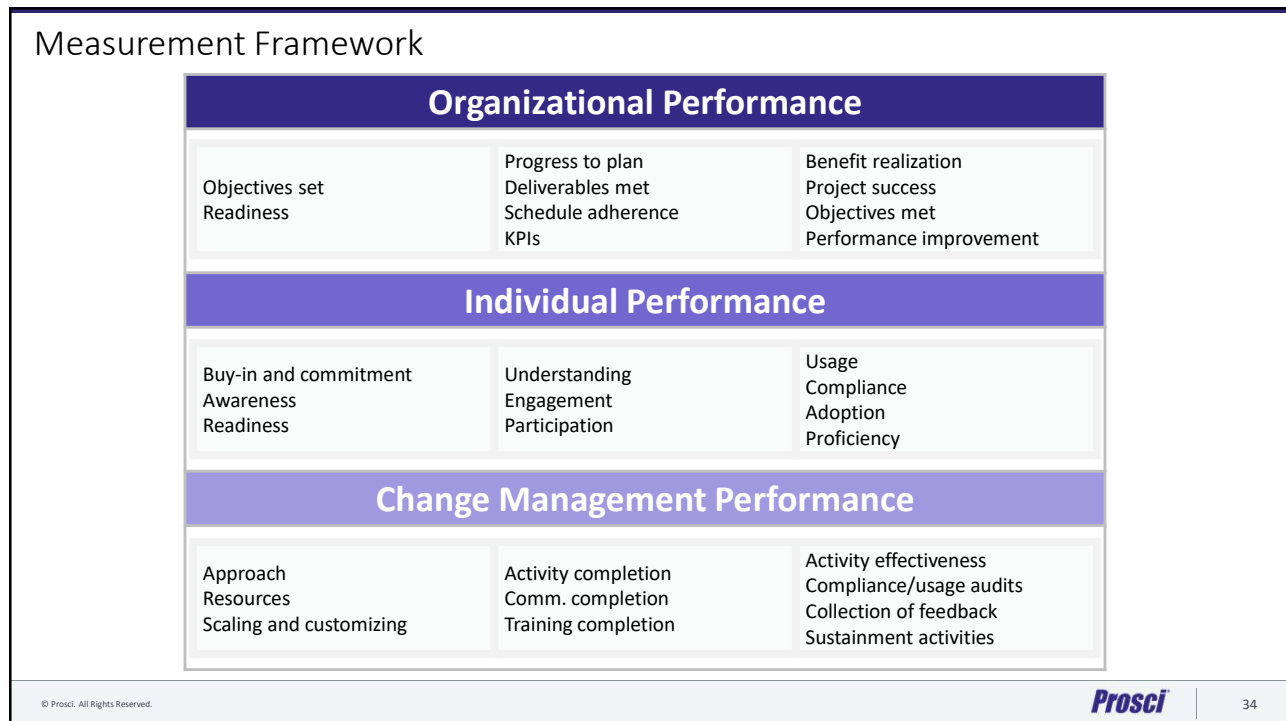
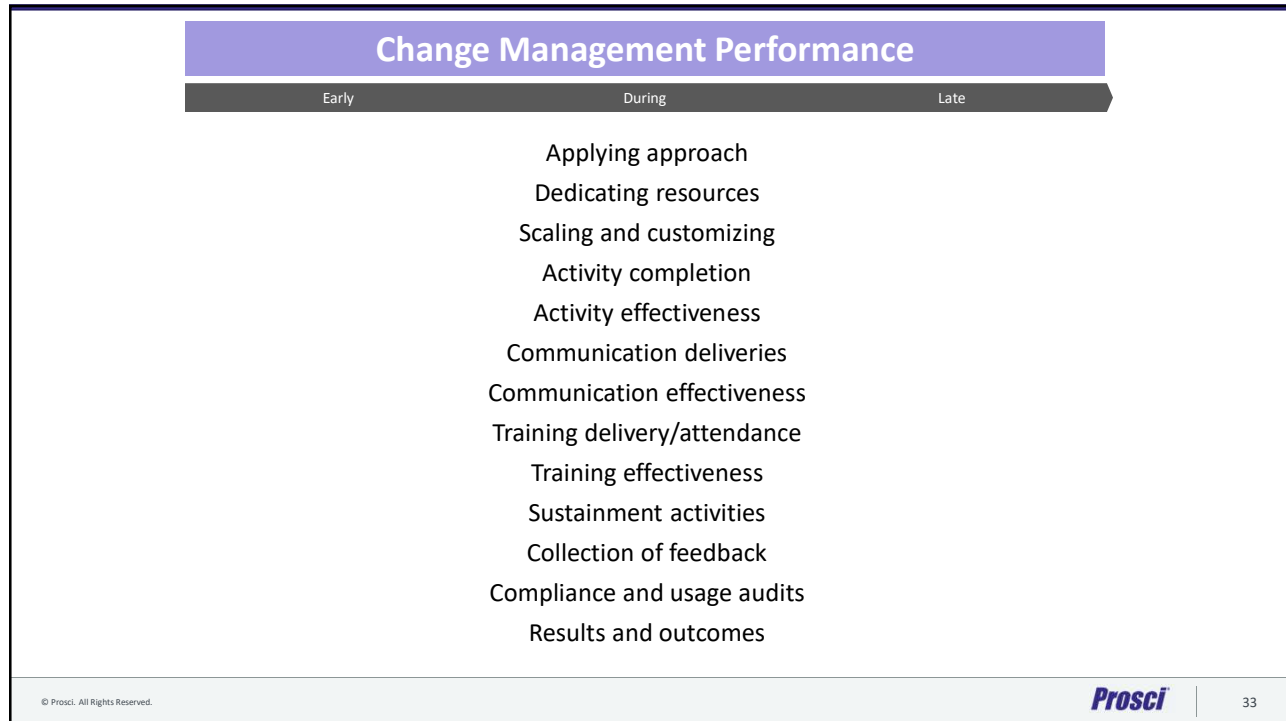
Did you have to **report on** change management effectiveness of the project?
To whom? What metrics did you use?

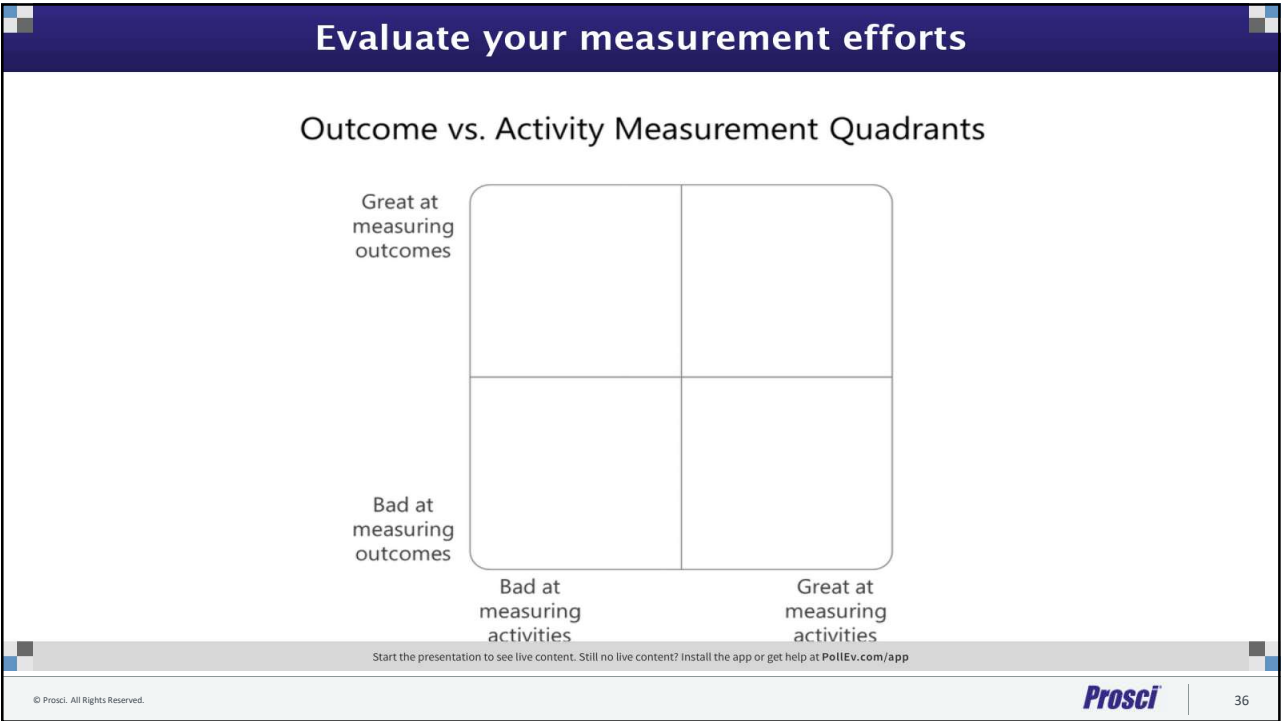
How did you demonstrate the **value-add** of applying change management on the project?

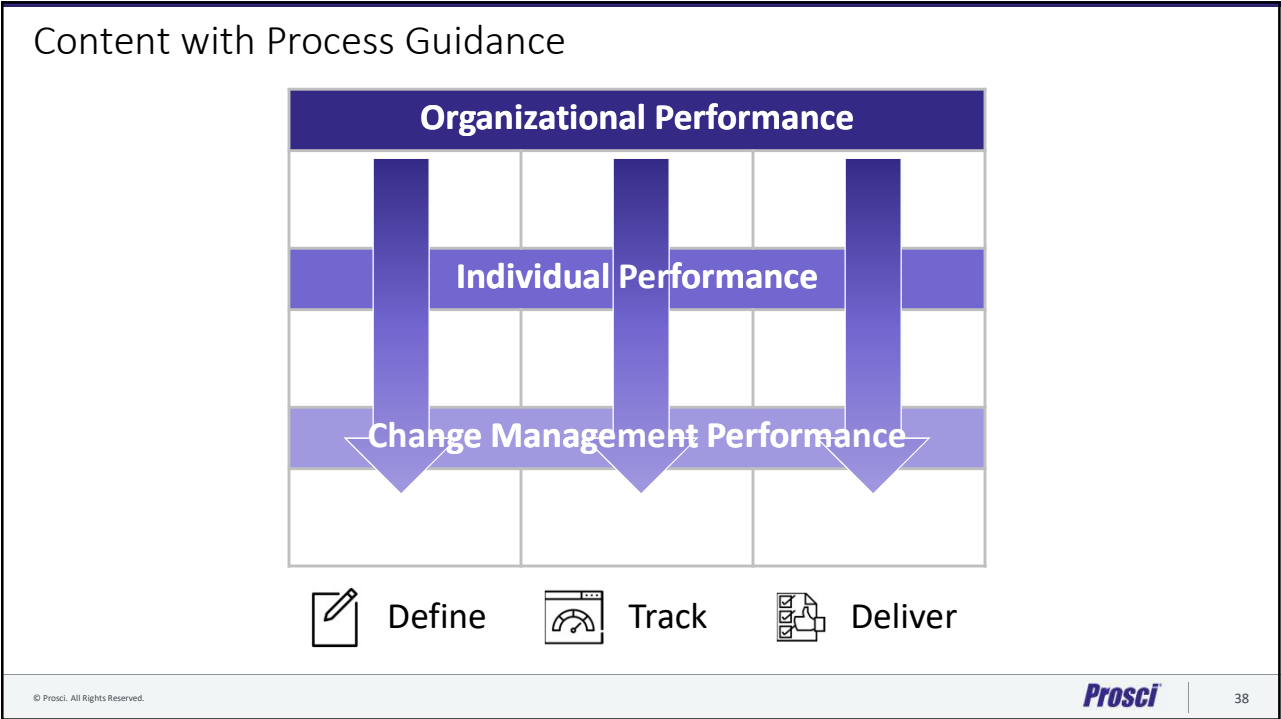
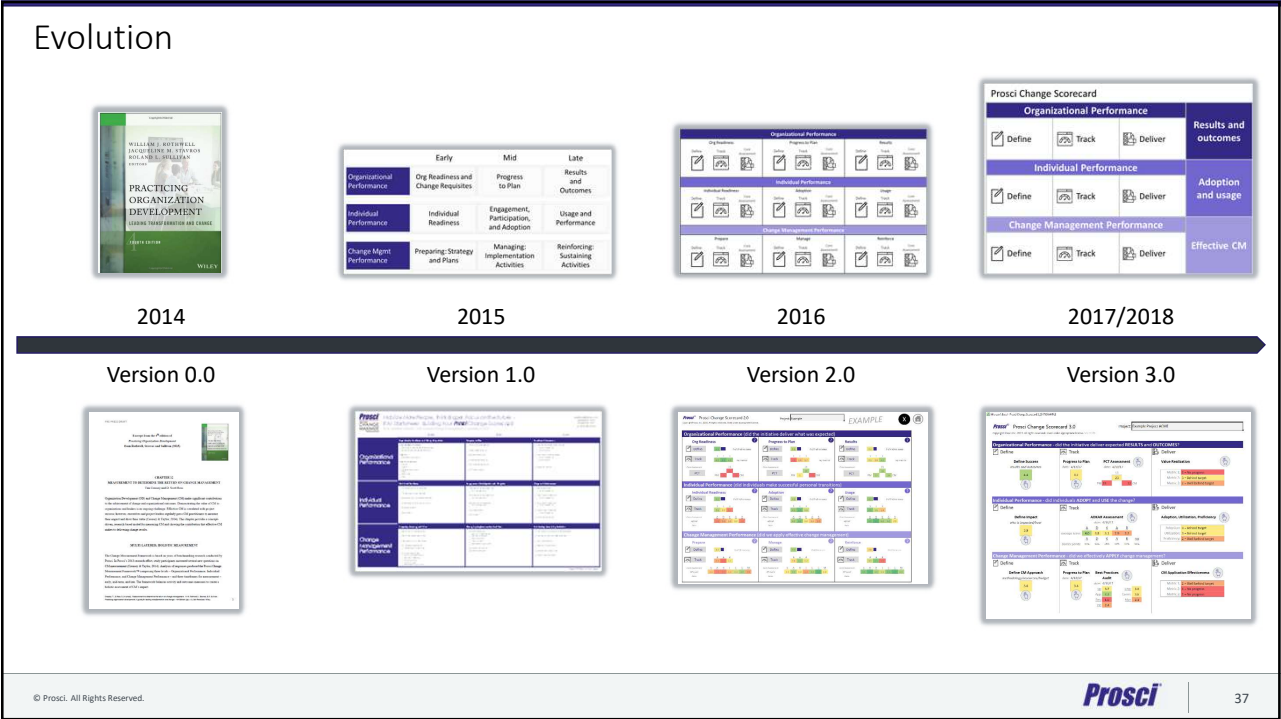
How did you measure the **overall outcome** of applying change management on the project?




















Organizational Performance			Results and outcomes
 Define	 Track	 Deliver	
Individual Performance			
 Define	 Track	 Deliver	Adoption and usage
Change Management Performance			
 Define	 Track	 Deliver	Effective CM

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Organizational Performance			Results and outcomes
Define Success	Progress to Plan (tech side) PCT (over time)	Value Realization	
Individual Performance			Adoption and usage
Define Impact	ADKAR Progress (ADKAR Dashboard)	Adoption Utilization Proficiency	
Change Management Performance			Effective CM
Define CM Approach	Progress to Plan (people side) Best Practice Audit	CM Application Effectiveness	

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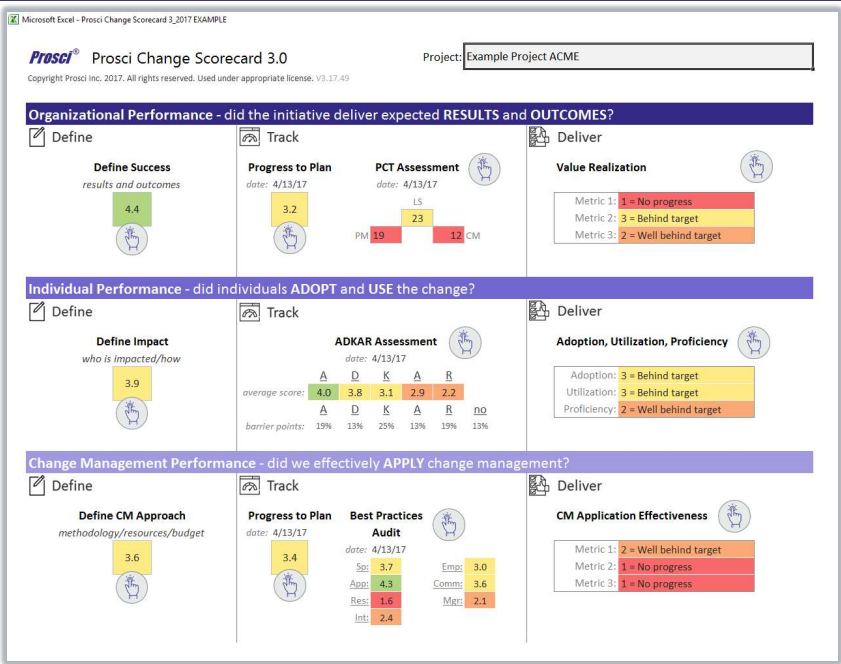
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Measuring Change and Driving Results with the Prosci Change Scorecard

Prosci webinars – www.prosci.com/webinars

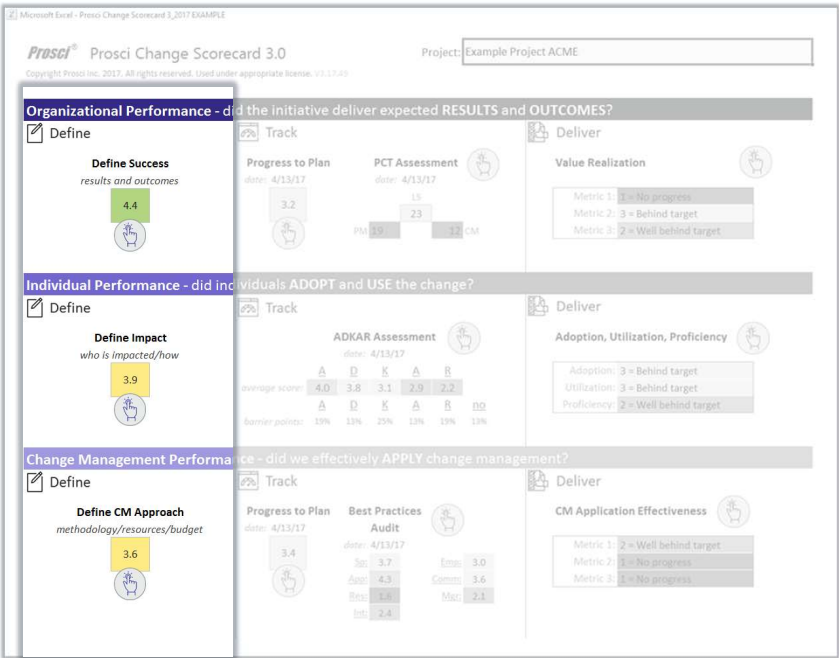
Prosci Change Scorecard



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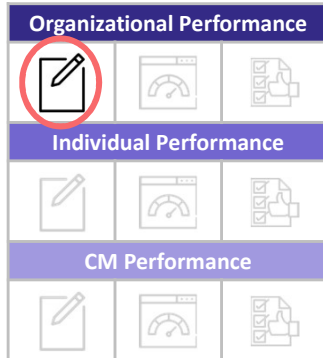


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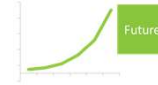
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Define **SUCCESS**



- Organizational benefits and project objectives **fully defined**:
- In a high degree of **clarity**:
- And assigned a **priority**:
- With an evaluation of **people dependency**:
- With defined **units of measure**:
- With assigned benefit/objective **owner**:
- Ready to be **socialized**:
- Change **requisites** (charter, scope, plan, resources, etc.):

Benefits



What the organization
gains

Objectives



What the project
achieves

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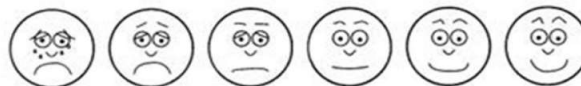
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Drop a pin: How clearly do we typically define **BENEFITS** and **OBJECTIVES** of our changes?

How well do you define
Organizational Benefits:



How well do you define
Project Objectives:



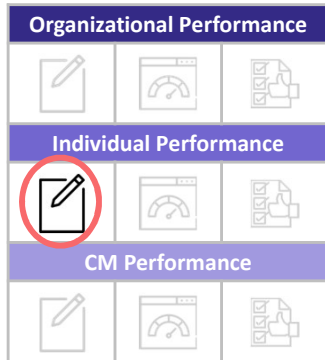
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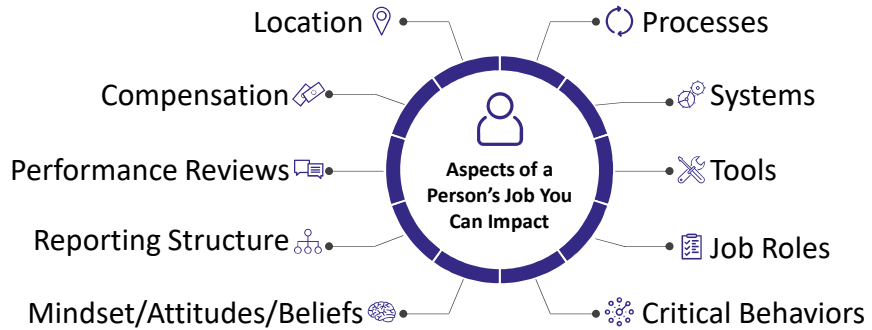
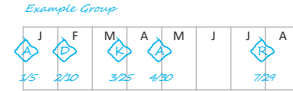
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Define IMPACT



- Impacted groups defined:
- Job aspect impact completed:
- ADKAR milestone dates identified:



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On a scale of 1 (muddy) to 5 (crystal) – how clearly defined are the individual changes required by your projects and initiatives?

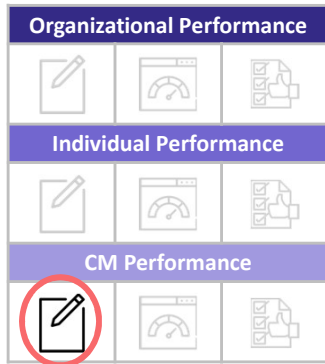
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Define CM APPROACH



- Structured **CM approach** selected and applied:
- Approach **scaled** and **customized**:
- Sufficient **dedicated resource(s)**:
- Sufficient **dedicated CM budget** in place:
- **Team** adequately prepared:
- **Sponsor coalition** evaluated:
- **Integration** with project plan scheduled/planned:
- Change management **plans** created:

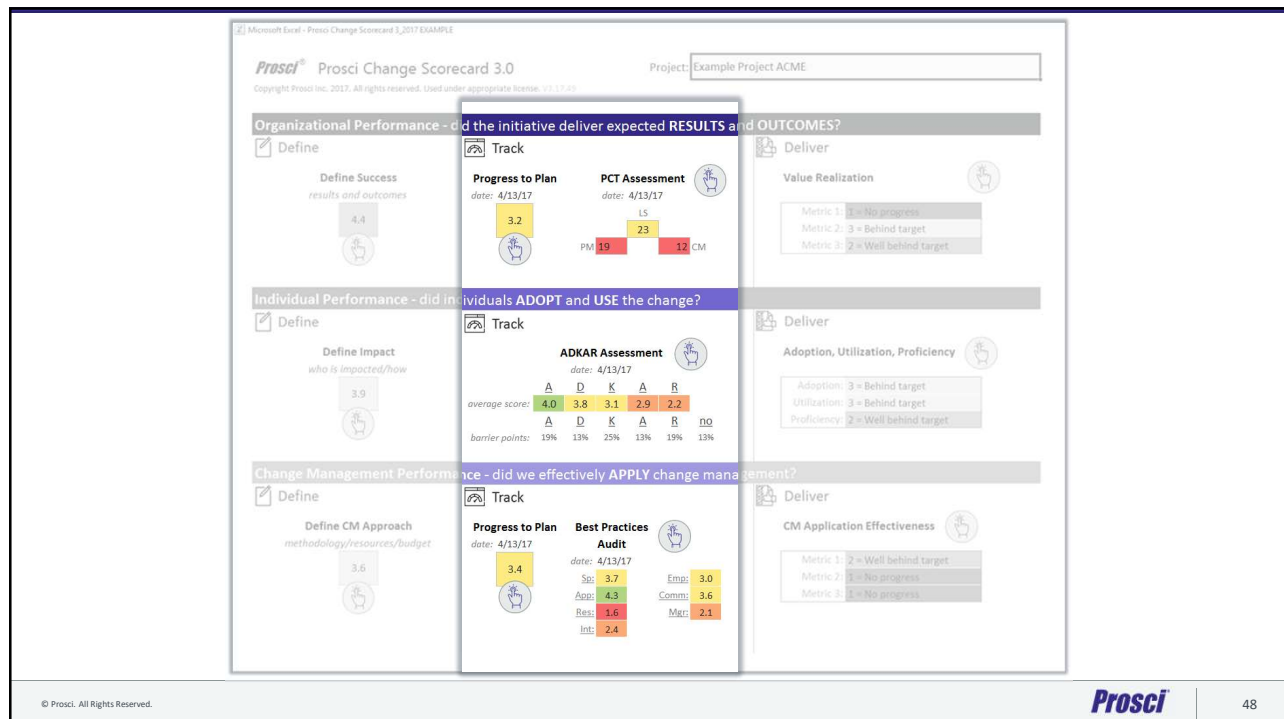
This is Phase 1+ in the Prosci Methodology



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Track x 3

Organizational Performance

Individual Performance

CM Performance

Organizational Performance / Track

Progress to Plan | PCT Assessment

Individual Performance / Track

ADKAR Assessment

CM Performance / Track

Progress to Plan | Best Practices Audit

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Microsoft Excel - Prosci Change Scorecard 3.0

Project: Example Project ACME

Organizational Performance - did the initiative deliver expected RESULTS and OUTCOMES?

Individual Performance - did individuals ADOPT and USE the change?

Change Management Performance - did we effectively APPLY change management?

Define Success results and outcomes

Define Impact who is impacted/how

Define CM Approach methodology/resources/budget

Track

Track

Track

Deliver

Deliver

Deliver

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Deliver x 3

Organizational Performance / Deliver

Value Realization

- Metrics with units of measure

Organizational Performance / Deliver

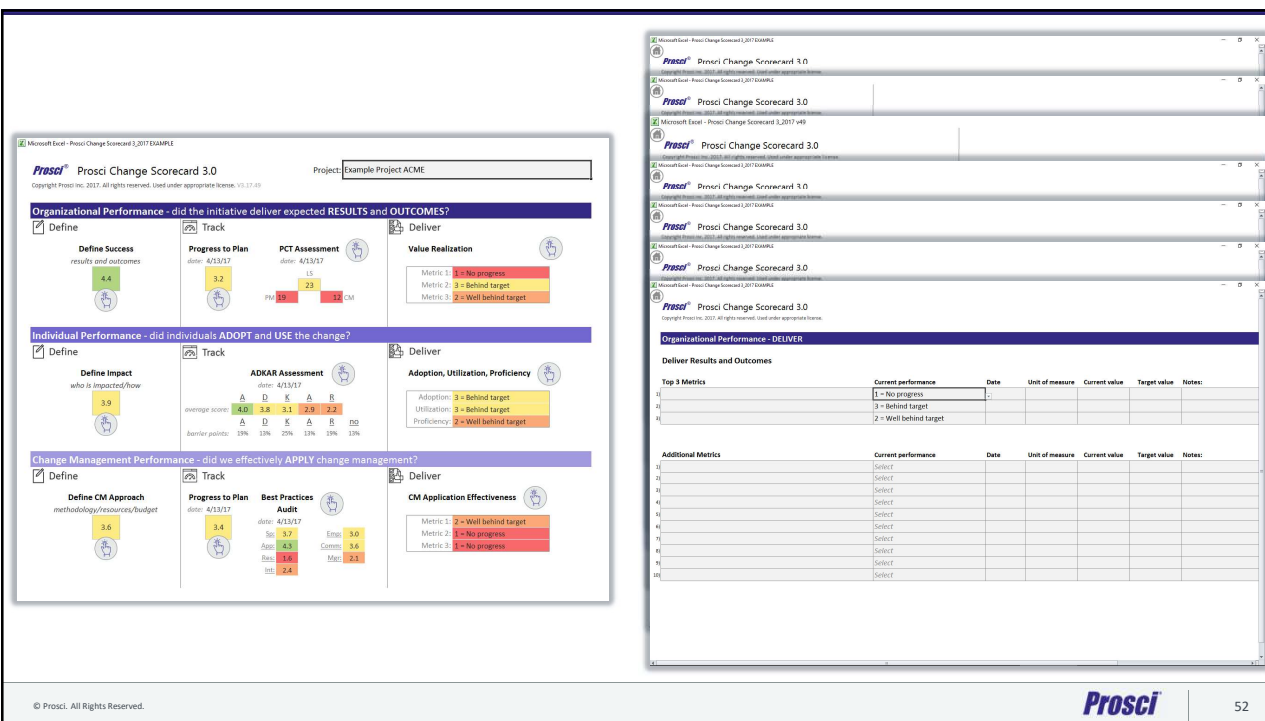
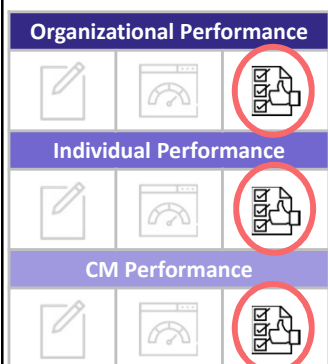
Adoption, Utilization, Proficiency

- Metrics with units of measure

CM Performance / Deliver

CM Application Effectiveness

- Metrics with units of measure



Science + Art of the Change Scorecard

Science Structure

- Big questions
- Connections
- Research foundation
- Outcome + Activity
- Structure (3x3)
- Diagnostic tools

Art Application

- Readiness (assessment)
- Definition of results and outcomes
- Facilitating difficult conversations
- Stakeholder engagement
- Application process
- Zoom

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Scorecard Readiness Assessment

- Purpose: To assist you to determine if the necessary conditions exist for the successful application of the Change Scorecard to your project.

Prosci® Change Scorecard Readiness Assessment solutions@prosci.com

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Prosci CM Practitioner Organization Change Project Sponsor Project Manager/Team

Use the buttons above to navigate to and complete assessments on each Change Scorecard Readiness factor.

Change Scorecard Readiness Assessment Results:

Readiness Factor	Score
Prosci CM Practitioner	NA
Organization	NA
Change Project	NA
Sponsor	NA
Project Manager/Team	NA

Review Actions to Consider based on your assessment results

Action Register

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Considering a current change effort – what would you estimate the readiness is for a Change Scorecard application?

Very ready

Ready

Nearly ready

Far from ready

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Total Results:

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Defining Success Metrics

1

2

3

4

5

Asked questions to clarify intended benefits & objectives

Identified benefit & objective statements

Prioritized benefits & objectives

Identified possible measures & metrics

Assessed feasibility of measures & metrics

Defined Success Metrics

Defined Success Metrics

1

2

3

4

5

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Key Definitions, Measurement & Metric Cheat Sheet

Key Definitions

1. Project (What is the project?)
2. Benefits (What are the benefits?)
3. Measurement (How will you measure success?)
4. Metrics (What metrics will you use?)
5. Targets (What are the targets?)

Common

1. The project or are
2. Key stakeholders
3. There are many impacts to assess.

Key Definitions

1. **Good metrics are valid, practical and actionable*.**
2. **Common categories of metrics include:**
 - Output (e.g., units processed, productivity, frequency, sales)
 - Time (cycle time, delay or wait time, speed to market)
 - Satisfaction (customer satisfaction)
 - Quality (accuracy, error rate, complaints)
 - Cost (expenses, savings)
 - Safety (accidents)
 - Employee information (turnover, absenteeism)
3. **Great ways to collect info:**
 - Surveys
 - Interviews
 - Focus Groups
 - Knowledge Tests
 - Skill Demonstrations
 - Performance Audits
 - System Data Extracts
 - Business Results

of metrics include:

- Processed, productivity, frequency, sales)
- Cycle time, delay or wait time, speed to market)
- Customer satisfaction)
- Complaints)
- Turnover, absenteeism)

to:

- Skill Demonstrations
- Performance Audits
- System Data Extracts
- Business Results

ions to clarify the project's true
define success include:

es. Ensure the definition of success

most value in driving key decisions on

Choose a smaller number of proxy
acted similarly.

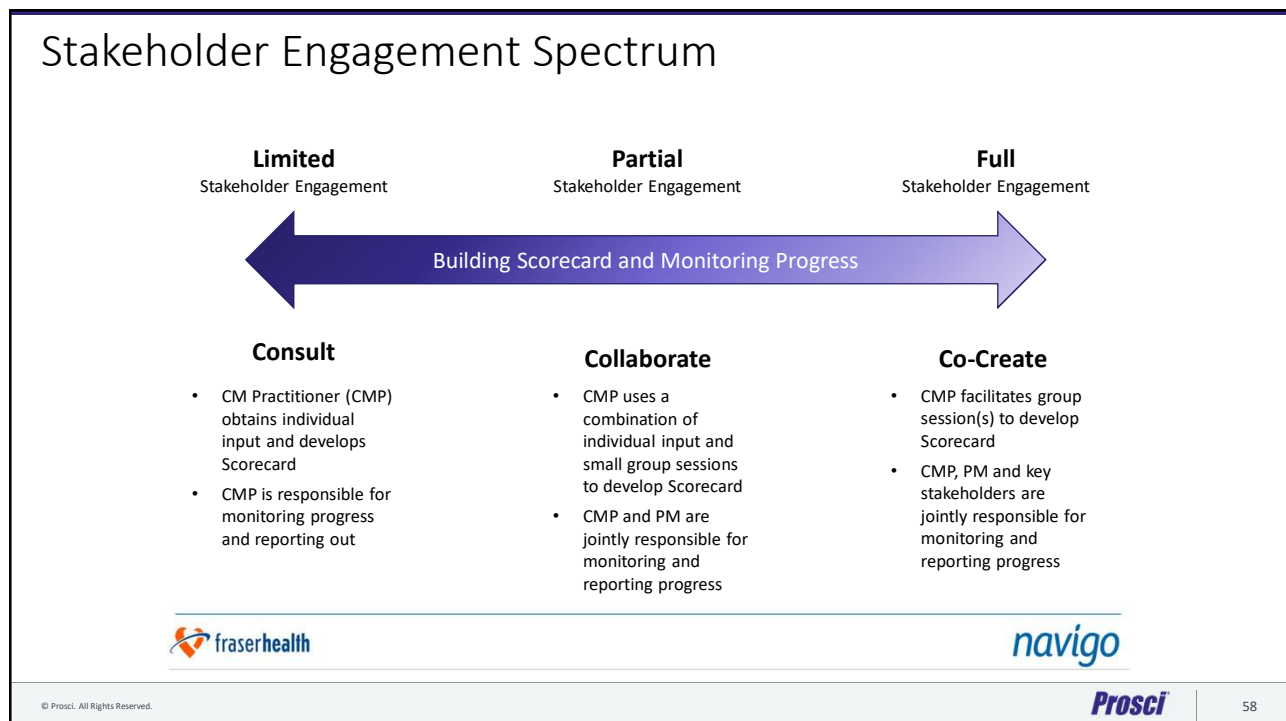
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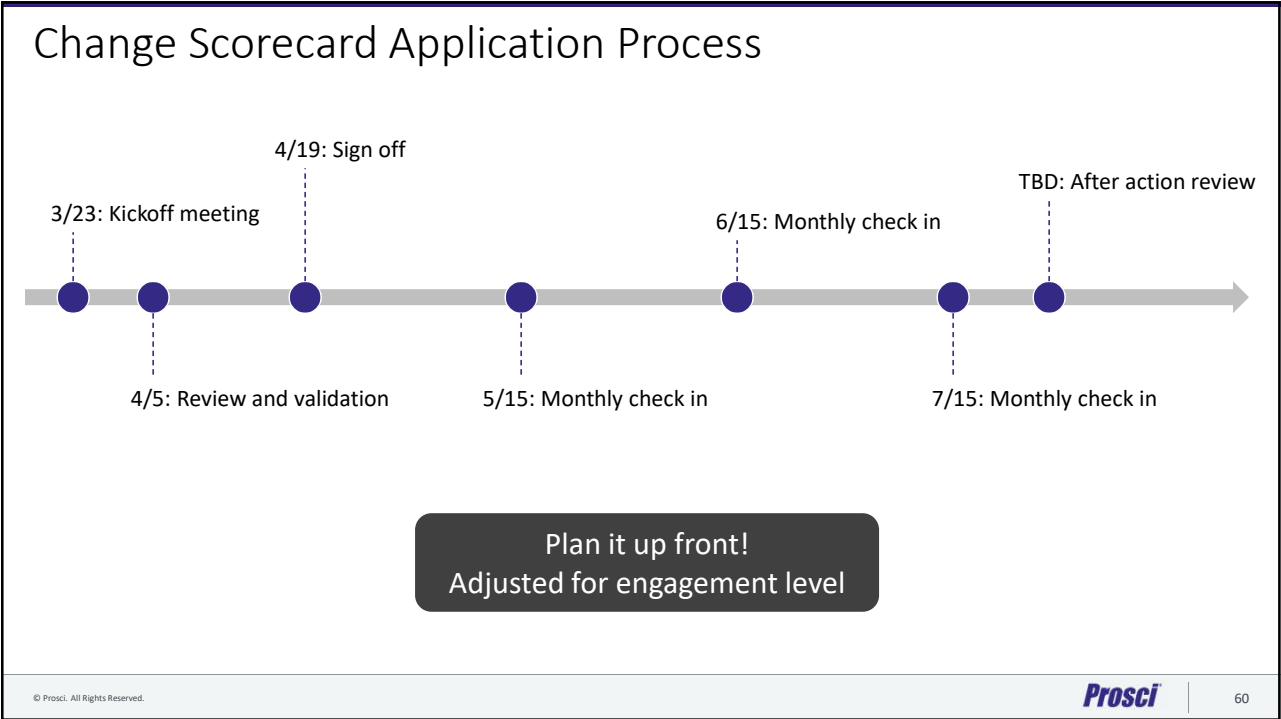
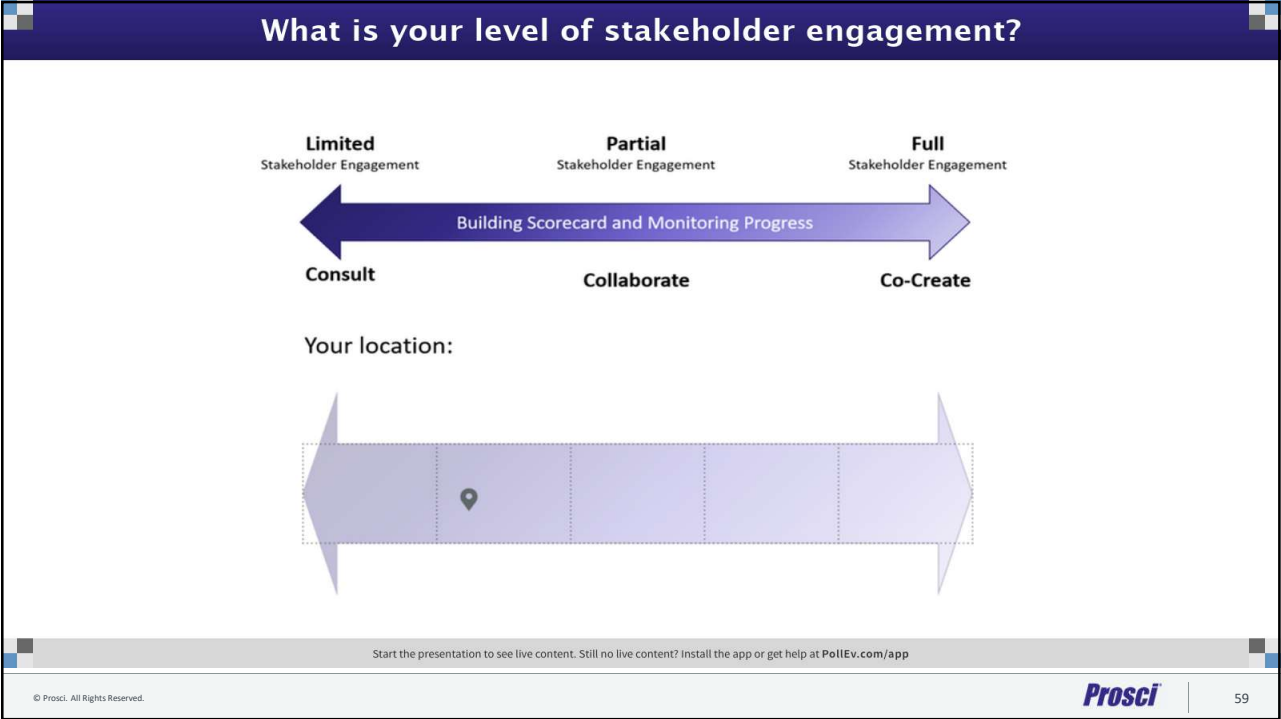
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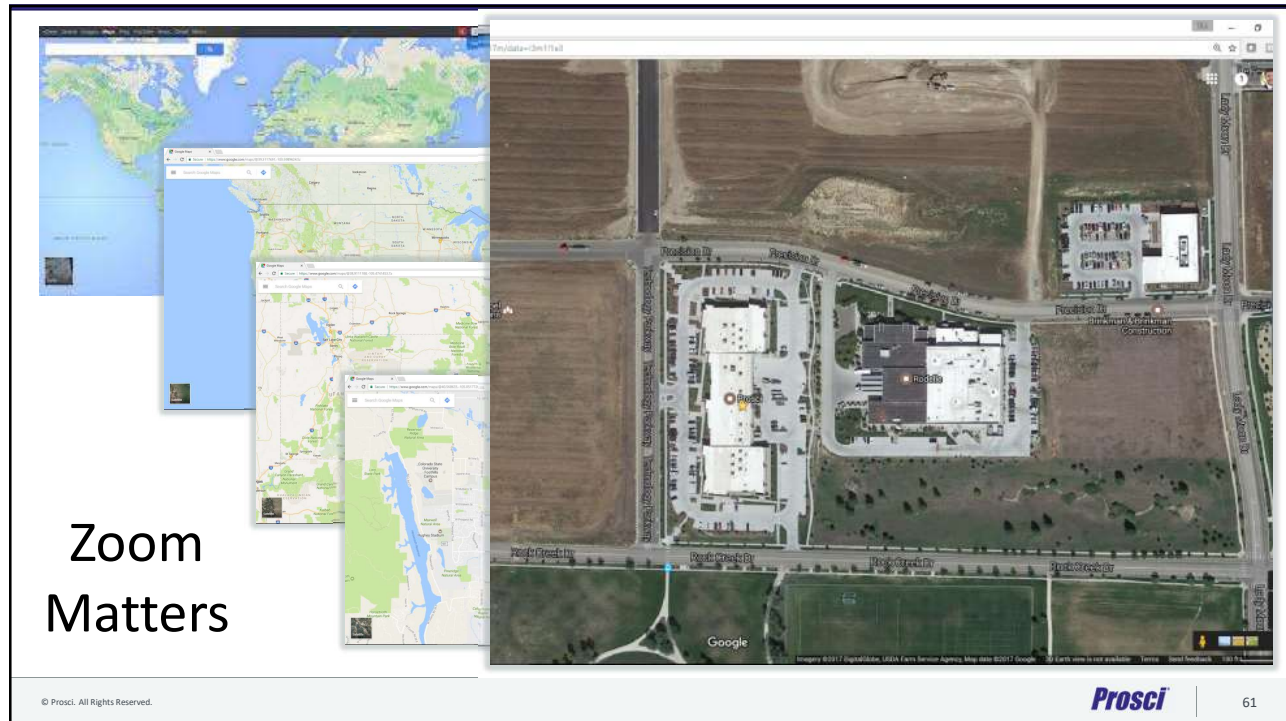
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Science + Art of the Change Scorecard

Science Structure

- Big questions
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- Structure (3x3)
- Diagnostic tools

Art Application

- Readiness (assessment)
- Definition of results and outcomes
- Facilitating difficult conversations
- Stakeholder engagement
- Application process
- Zoom

How to access the Prosci Change Scorecard:

All Access Portal Subscription (portal.prosci.com)

Advanced Immersion (at Prosci HQ)

Change Scorecard Advisory Workshop

Change Management Project Support Engagement

solutions@prosci.com

Conclusion and Q&A

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Science + Art structure and application

Prosci Solutions

Delivering organizational results by
catalyzing individual transitions

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

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