

Organisational Change Management

Change Charter

-

Company Name

(E.g. An ERP
implementation
Project)

An Overview from



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Approval of this Charter indicates an understanding of the purpose and content described herein.

By signing this charter, dedicated to the OCM work-stream (People focus) within the XXXX XXXX ERP project, each individual agrees the relevant work will be initiated and, necessary resources will be committed.

Approver Name	Title	Signature	Date
Executive			
Sponsor			
Manager 1			
Manager 2			

Purpose

The OCM Change charter outlines the change teams' mission for the ERP system implementation, including goals, objectives and those factors critical to success (CTS). The document sets the overall direction for the members of the change team as they plan and implement the change processes that will address the human resource and organisational aspects of the ERP system implementation. It is focused on minimising project risk, accelerating project benefits and, optimising current and future processes and structures.

Objective

The Change Charter defines how the change team will work within the project and the organisation.

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1. CHANGE TEAM MISSION (PURPOSE AND RATIONALE)

Q. What is the ultimate intent and purpose of the change team?

Q. What is the one driving force ... the consistent thread ... that sits behind action and direction and runs through all the people involved?

Example:

The core change team is responsible for ensuring organisational risks* and, those risks which emerge due to the human factors associated with organisational change, are thoroughly understood and addressed, throughout all stages of the programme, to ensure a successful software implementation.

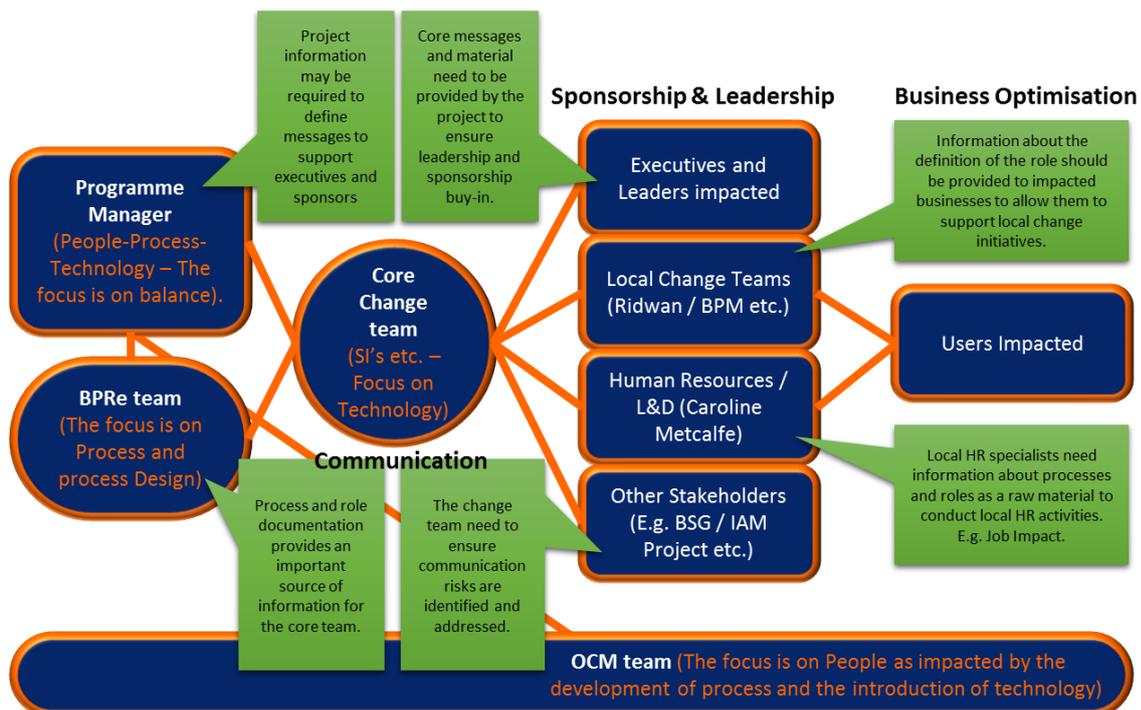
*ERP language often focuses on 'Risk'. Dux advocate a focus on opportunities and / or benefits to ensure a positive connotation is engrained in the minds of the core team and becomes part of all communications as standard. This ensures we are selling the positive as much as we are using fear / risk, to engage stakeholders.

Once issues related to human factors are identified, the team will ensure support is provided to those areas of the business that have the responsibility for minimising risk and maximising opportunities and benefits.

NB: *the specific statement, which will provide a common purpose for all to use as an over-arching constant during change will necessarily be developed with the core team and other key stakeholders, to ensure ownership and deep alignment is established at the earliest possible opportunity.*

2. KEY RELATIONSHIPS – PROJECT / ORGANISATION

Q. What are the key relationships between the change team, the project and the business?



3. ORGANISATIONAL OPTIMISATION CHANGE CHARTER

a. Mission

ERP Says ...

Q. What are the overall objectives of the organisational optimisation plans and activities?

Example: To minimise risks* to the programme, which could occur from the organisation, jobs and the system not being properly aligned.

DUX Say...

Define 'properly aligned'. Aligned to what?

Alignment is a complex subject. Duxinaroe are ideally positioned to develop a deeper understanding of alignment throughout the change team, leaders and key stakeholders. We propose to cover such issues as; definitions of 'good' and multiple perspectives. This will enhance the team's collective capability to focus their thoughts and efforts (What and How) on ERP's 'Prime Directive' '**Act with the end in mind**', where that end may be, "*Create the conditions throughout the programme which facilitate acceptance and enthusiasm for the launch of ERP as a solution to current challenges*"... an alternative 'end' could be "*In whatever you do, increase the confidence of others*".

b. Guiding Principles

ERP Says ...

Q. What principles will the change team follow to ensure that communication risks are minimised and, benefits are maximised across all stakeholder groups?

Example: The change team will provide all relevant design information relating to roles, to local HR specialists. The HR specialists will use this information to implement changes to local job descriptions.

DUX Say ...

Imposed Role change can be traumatic for people, provoking resistance to change and resistance to systems and solutions. Such a response can extend the time people take to reach understanding and agreement which, in turn, delays the time taken to reach competency in the new roles. Overall, these delays impact upon the Quality, Cost and Delivery of the project. Duxinaroe will enable the team understand how and why they must maximise the inclusion of those people impacted, to ensure any role changes make sense and become part of a natural evolution wherever practicable.

c. Objectives and Goals

ERP Says ...

Q. What specific objectives and goals should the change team follow when conducting this work?

Example: The change team will ensure that information about every role is documented and provided to the business by the end of the blueprint phase.

d. Critical Success Factors

ERP Says ...

Q. How will the change team know that it has been successful in reducing the organisation optimisation risks?

Example: Organisation structures are appropriately and effectively aligned to support full optimisation of the system beyond the implementation.

DUX Say ...

Extend that sentence as follows: ... with acceptance attained following the evolution of buy-in of all impacted and involved, at a cultural level, due to the understanding in and conduct of the change team, stakeholders and leaders around the organisation.

4. COMMUNICATION CHANGE CHARTER

a. Mission

ERP Says ...

Q. What are the overall objectives of the communication plans and activities?

Example: The Change team will provide consistent information tailored to the specific needs of the stakeholder groups. As a result stakeholders are able to embrace the proposed changes.

DUX Say ...

'*Embracing change*', requires more than the receipt of; tailored, needs specific and timely information.

Failing to provide at least this level of communication significantly increases the risk of resistance. *Embracing change* follows recognition of the need to create confidence and ownership through inclusion. Duxinaroe will set the bar high for the change team, to ensure the pre-requisites for such outcomes are thoroughly understood and align to the prime directive of 'acting with the end in mind'.

b. Guiding Principles

ERP Says ...

Q. What principles will the change team follow to ensure that communication risks are minimised and, benefits are maximised across all stakeholder groups?

Example: All communication will be simple, understandable and, tailored to meet the needs of every stakeholder group.

DUX Say ...

There is often complexity behind simple solutions. Failing to understand this often leads to actions misaligning to outcome requirements. E.g. simple communications, such as a good 20 minute TED talk must remain cognoscente of primacy and recency effects, short-term to long term memory conversion, audience attention issues during presentations, the impact of stress, tapping into emotions etc.

Delivering factual information alone often fails to address the deeper issues behind effective communication. Duxinaroe can provide effective communication L&D sessions for the core team, stakeholders and leaders to ensure such issues are understood and the impact and effectiveness of communications are maximised throughout the programme.

c. Objectives and Goals

ERP Says ...

Q. What specific objectives and goals should the change team follow when conducting this work?

Example: The change team will ensure that every employee affected by the program is provided with information about the benefits.

DUX Say ...

Promoting benefits is typically associated to sales and / or proposal writing. To do this well, courses typically introduce the concept of ‘tapping into emotions’. Duxinaroe can support the team, so the emotional message being delivered by communication activities and what is received by stakeholders, is considered in practical detail.

E.g. One example of a ‘ERP’ project recently brought to our attention saw a communication sent out across an organisation which stated everyone was required to buy-in and support the programme, the closing paragraph on the same communications document also announced the potential for redundancies... logically, the communication and content made sense; failing to consider the emotional response caused damage to the programme.

d. Critical Success Factors

ERP Says ...

Q. How will the change team know that it has been successful in reducing the communication risks across all stakeholder groups?

Example: Timely communication has been provided to every stakeholder group affected by, or providing support to, the project.

DUX Say ...

As described above, Duxinaroe are well positioned to set the bar high for the change team, in terms of increasing the knowledge surrounding the requirements behind effective communication. Where “Forearmed is forewarned” is an old saying that still rings true today.

5. SPONSORSHIP AND LEADERSHIP CHANGE CHARTER

a. Mission

ERP Says ...

Q. What are the overall objectives of the sponsorship and leadership plans and activities?

Example: The Change team will provide a world class programme for executives and leaders, to ensure that they take ownership of the changes and set an example to the rest of the organisation in driving home the benefits.

DUX Say ...

In context of Responsibility & Accountability, Ownership is the opposite of denial and avoidance (See separate slide pack). People are provoked to avoid ownership, responsibility and accountability when the environment in which they survive, provides mixed messages, uncertainty, judgement and fear. Ownership is only possible where these issues are openly discussed, understood and actively addressed. In that sense, for the team to provide a 'World Class Programme', there must be increased awareness and a working knowledge developed around the Human factors effecting organisational change.

b. Guiding Principles

ERP Says ...

Q. What principles will the change team follow to ensure that sponsorship and leadership risks are minimised and, benefits are maximised across all stakeholder groups?

Example: The change team will ensure that sponsorship and leadership initiatives are driven from within the business, not forced in from the outside.

DUX Say ...

The example is laudable, however, assumes an acceptable internal current state in which benefits can be maximised if a standard approach is taken towards OCM / guiding leaders. At XXXX XXXX, there are already multiple initiatives underway, low level communications effectiveness, a high level of disconnect between initiatives and a degree of confusion throughout management teams as a result. This increases stress in process pockets. For example, in ABC Department the current attrition rate of Project Managers is 65%. In this case, the programme will require more than an internal drive, it will require a joined up approach, bringing multiple initiatives together so all activity around the business evolves toward a deeper level of alignment.

c. Objectives and Goals

ERP Says ...

Q. What specific objectives and goals should the change team follow when conducting this work?

Example: The change team will ensure that information and coaching is available for every executive and leader where requested / required.

DUX Say ...

Leadership development activities in support of the change programme must become consistent across the organisation and include a deep understanding of the positive effect increased alignment (among other cultural issues) delivers. Developing such a consistent level of knowledge and approach (Between OCM / ERP, L&D, HR etc. and across all leadership teams within the Directorates) will systematically address many of the point's alluded to above, for example, increased clarity of purpose, confidence, reduction of fear, judgement, ownership etc.

Where such issues are considered and addressed in relation to the ERP projects objective to balance 'People-Process-Technology', the potential for the change programme to be delivered successfully will be maximised.

d. Critical Success Factors

ERP Says ...

Q. How will the change team know that it has been successful in reducing the sponsorship and leadership risks across all stakeholder groups?

Example: The leaders of the organisation are actively participating in driving home the key messages and, selling the benefits.

DUX Say ...

Where those issues listed above are included in the OCM approach within the ERP programme and across the organisation, we would expect to see leaders, including those within the change team to act in ways which compliment rather than contaminate the ultimate intent and purpose of the programme.

We would expect leaders to move away from communicating with language like 'participating', 'selling', 'sponsoring' and 'supporting' and move towards action which provokes others to describe them as 'leading by example', being involved, becoming the driving force etc.