Change Management Approach
Support U-M’s leadership in teaching, learning and discovery by helping students, faculty, and staff to collaborate anytime, anyplace, and with anyone in the world with Internet access.

Google Apps for Education includes:

- Email
- Calendar
- Docs
- Sites
- Contacts
- Blogger
- Talk
Create a consistent, positive experience for how U-M supports faculty, staff, and students’ use of computing devices and the resources they use to access, store, and secure their data and ideas.

The IT Rationalization projects that are part of the “End-User Services” bundle include:

- End-user computing (desktop support)
- Network
- Cloud (server virtualization)
- Storage
- Information assurance (security)
We will use a standard **cadence**, communicating with approval, advisory, and awareness groups in the appropriate order:

- Governance Groups – Approval, Advisory, Informational
- Unit Leadership
- Unit IT Management
- Unit IT Employees
- Circle of Influence and Affected Parties – (e.g., Faculty/Researchers/Staff/Students)
Both the Google and End-User Services “Bundle” will utilize a **pilot framework:**

- Begin internally (ITS)
- Expand small & friendly
- Increase challenge & scope
- Complete using a methodical process
The change management methodology contains seven key elements:

1. Change Impact Analysis
2. Stakeholder Analysis
3. Risk Assessment & Key Questions
4. Performance Support Plan
5. Communication Plan
6. Workforce Plan
7. Unit Readiness Plan
The Change Impact Analysis:

- Documents people, processes, and technology changes
- Identifies organization, skills, knowledge, culture, and system changes
- Evaluates how changes affect stakeholder groups
The **Stakeholder Analysis:**

- Identifies key individuals or groups
- Increases their readiness for accepting changes to yield best possible results
The **Risk Assessment**:  

- Identifies, evaluates, and mitigates risks  
- Generates key questions stakeholder groups may need answered
The **Performance Support (Training) Plan:**

- Identifies training scope and materials
- Designs a training curriculum that bridges process, tool, and role changes
- Allows individuals to learn in a variety ways beyond the traditional training formats
The Communications Plan:

- Documents specific communication objectives
- Identifies key messages and talking points
- Defines outreach activities for key stakeholder groups
- Engage affected parties across campus
The Workforce Plan:

• Creates a process to match the right people with the right skills with the right opportunity at the right time

• Documents new employee roles and responsibilities

• Defines ITS orientation activities

• Ensures roles and responsibilities reflect guiding organizational principles
The Unit Readiness Plan:

- Identifies activities that demonstrate the unit is ready for conversion
- Minimizes the level and duration of performance drop-off
- Maximizes the short-term benefits of the change
Consider additional Change Management Principles to build a framework that:

- Incorporates shared vision and ownership
- Builds materials that speak to both the rational and emotional side of stakeholders
- Creates activities at the individual, team, and organizational level
- Identifies existing processes that are being retired so employees can redirect their focus toward new initiatives
“Rarely a graceful leap from height to height”
- Tim Brown, CEO, IDEO
Change management **scope** includes:

- IT Rationalization “Bundle”, including:
  Desktop, Network, Security, Storage, Cloud

- Workforce Planning

- Google Collaboration

- Shared Service Provider Capabilities, including:
  Customer Relationship Management, Portfolio & Project Management, Cost Management, Service Management, and Operations/Availability

- ITS Staff
Planning efforts focus on key populations including:

- Sponsors
- Governance & Advisory Groups
- Unit Representatives
- Unit Leadership
- Unit IT Leadership
- Unit IT Employees
- ITS Service Provider Teams
- Faculty, Researchers, Staff, Students, Alumni, Retirees
ITS acknowledges the need for shared expectations between the project teams and our key campus populations.

In this presentation we will provide:

- What groups can expect from us
- What we expect from our partners to make these projects a success
Sponsors can expect us to:

- Update them on project status, planning, design, and roll-out strategies on a routine basis
- Provide opportunity to review, revise, and approve materials
- Act on recommendations they provide for approach, timing, and engagement
To improve chances for success, we request the following of our sponsors:

- Reinforce the purpose, rationale, and priority of this effort
- Share concerns and suggestions candidly while remaining committed to building workable solutions
- Consider how the project will be received across campus
- Review projects at each gate
- Advocate for the projects with senior leadership – especially during the valley between hope and confidence
Governance/Advisory Groups can expect us to:

- Update them on project status, planning, design, and rollout strategies on a routine basis
- Provide opportunity to review and revise materials
- Act on recommendations they provide for approach, timing, and engagement
To improve chances for success, we request the following of our governance/advisory groups:

- Advocate for the projects with units across campus
- Share concerns and suggestions candidly while remaining committed to building workable solutions
- Consider how the project will be received across campus
- Communicate project announcements and information at the unit level
Unit Representatives can expect us to:

- Update them on project status, planning, design, and roll-out strategies on a routine basis
- Provide opportunity to review and revise materials
- Ask for feedback on project vision and key messages
- Act on recommendations they provide for approach, timing, and engagement
- Design unit readiness activities for their units to complete
To improve chances for success, we request the following of our **unit representatives**:

- Share concerns and suggestions candidly while remaining committed to building workable solutions

- Consider how the project will be received across campus

- Communicate project announcements and information at the unit level

- Coordinate unit planning and readiness activities

- Identify necessary unit team members for planning and roll-out
Unit Leadership can expect us to:

- Conduct unit kick-off activities to begin roll-out process
- Schedule standing meetings to complete unit planning
- Ask unit to define roll-out team members
- Authorize unit leadership to select workforce planning options and make workforce decisions
- Empower unit leadership with possible meeting content and manager speaking points to cascade information to employees
Unit IT Leadership can expect us to:

- Conduct unit kick-off activities to begin roll-out process
- Schedule standing meetings to complete unit planning
- Ask unit to define roll-out team members
- Empower unit leadership with possible meeting content and manager speaking points to cascade information to employees
- Collaborate to clarify future role and responsibilities for ITS and unit employees going forward
To improve chances for success, we request the following of our unit leadership (including IT and HR leadership):

- Share concerns and suggestions candidly while remaining committed to building workable solutions
- Consider how the project will be received in the unit
- Participate in unit implementation and workforce activities
- Identify necessary unit team members
- Provide transparency to unique faculty/staff needs
- Assist in defining roles and responsibilities for unit IT and ITS staff going forward
Unit IT Employees can expect us to:

- Provide information to unit leadership about calendar, implementation approach and workforce approach
- Provide support and resources for all workforce planning
- Request their help with unit implementation planning and discovery activities
- Collaborate to clarify future role and responsibilities for ITS and unit employees going forward
To improve chances for success, we request the following of all IT employees:

- Share concerns and suggestions candidly while remaining committed to building workable solutions
- Participate in unit implementation and workforce activities
- Assist in unit technical discovery process to develop accurate scope and identify unique issues
- Provide transparency to unique faculty/staff needs
- Assist in defining roles and responsibilities for unit IT and ITS staff going forward
Transitioning Employees joining ITS can expect us to:

- Orient them to ITS culture and organization
- Provide onsite mentorship by advance team
- Provide coaching and support from ITS managers
- Create routine team building activities
- Train employees on tracking tools and new processes
- Celebrate accomplishments and milestones
To improve chances for success, we request the following of our Transitioning IT employees:

- Participate in orientation/training activities
- Attend team meetings and functions to build relationships – especially important for geographically-dispersed employees
- Share concerns and suggestions while remaining committed to building workable solutions
- Collaborate with ITS and unit IT teams following go live to create an atmosphere of shared responsibility and investment
Circle of Influence/end-users can expect us to:

• Provide campus-wide opportunities to learn about changes at a high-level before unit-specific communication begins

• Send targeted communications once unit implementation activities are underway

• Invite individuals to unit-specific presentations

• Conduct individualized unit readiness to define device setup, software, data, and security needs

• Provide quick reference documentation on where to locate resources and support going forward
To improve chances for success, we request the following of our circle of influence/end-users:

- Share concerns and suggestions candidly while remaining committed to building workable solutions.
- Ask questions during reorientation to new environment to make sure all individual needs are met/addressed.
- Utilize new process to request help and support.
- Exercise patience if ITS and unit IT employees need to triage questions or requests for service to the best possible team member to complete the work.
Campus-wide activities happening today include:

- Talking with key units to engage in customer relationship management activities
- Meeting with unit representatives to build relationships and share information
- Hosting steering and working groups to refine the service design and share expectations
- Posting web content for key messages and activities
- Publishing articles, newsletters, and Web content for key messages and activities
The “road map” to go live for units will include up to a six-month planning process, focusing on four specific areas:

- Implementation Approach Planning (Technology Transition)
- Workforce Planning (Employee Transition)
- Advance Team Planning (Employee Mentoring)
- Circle of Influence Planning (End-User Support)

A unit kick-off event will detail the timing and steps for each.
Individualized **Implementation Planning** will be developed for each unit. This includes:

- Scheduling planning and discovery activities
- Defining ITS and unit IT team members
- Conducting a robust discovery process (e.g., evaluation of unit hardware, service levels, unique needs, specific employee needs, etc.)
- Conducting individualized employee needs assessments (e.g., devices, software, data, security, etc.)
- Generating an individualized employee migration plan and calendar
- Migrating employees and providing individualized reorientation to new environment
- Clarifying roles and responsibilities between unit and ITS employees
Individualized **Workforce planning** will be developed for each unit. This includes:

- Scheduling standing workforce meetings
- Selecting workforce strategy options
- Providing “meeting in a box” content and manager speaking points for unit leadership to facilitate conversations with IT employees
- Conducting eProfile activities (if chosen by unit)
- Hosting unit IT manager/employee meetings to discuss placement
- Sending offer letters and conducting HR activities for employees joining ITS
- Orienting/onboarding/training/mentoring employees moving to ITS
An **Advance Team** will provide coaching, support, and structure for transitioning employees, including:

- Participating in implementation and workforce activities
- Welcoming transitioning employees to ITS
- Coordinating training efforts for transitioning employees
- Backfilling transitioning employee responsibilities during orientation
- Providing process, role, and responsibility training
- Coaching on ITS culture and ITSM tracking tool
- Mentoring new employees through go live, and shadowing during stabilization
- Serving as an ongoing point of contact following stabilization
Individualized circle of influence (end-user) support will be developed for each unit. This includes:

- Communicating coming changes including vision, impact, timeline, and resources
- Providing ongoing informational and marketing communications
- Conducting individualized employee needs assessment (e.g., devices, software, data, security, etc.)
- Inviting individuals to unit-specific presentations
- Providing individualized migration schedules
- Conducting individualized reorientation to new environment (e.g., file location, programs, printing, network, security, and information on new support structure)