



Organizational Change Management @ MIT

### Redefining the Goal

Success is not defined by being on budget and on time - those are only requirements. Success is defined by producing the customer value and they begin to use it.

Charles Dierkes (MIT Director and Manager)

"Real and Permanent Good"

PLAN → EXECUTE → MEASURE

### Organizational Change Management

More than just communications

- Transitional (MIT, starting 2012)
- Ultimate Objective: to provide adoption of products and services by customers

**Prosci**

A D K A R

ADKAR Model: Awareness, Desire, Knowledge, Ability, Reinforcement

### Awareness

Fundamentals

- Read the reality of changeover/transition or knowledge transfer is about to occur

Tasks

- Company announcements
- Phone calls
- Large staff meetings

MIT Summit

- Are you aware of MIT's strategy? (How will it be implemented and how will it be a win?)

### Desire

Fundamentals

- Why does it matter?
- Understand the benefits why
- Communicate, demonstrate, demonstrate

Tasks

- Repetitive communications
- Direct dialog
- Management responses

MIT Summit

- Why are you here?
- Do you know what you expect to learn?
- Are you here because you were told to be or because you were assigned to be?

### Knowledge

Fundamentals

- Education on how to use the new service
- Education on how to transition to the new service
- Self-confidence in using the new way

Tasks

- Education
- Training

MIT Summit

- Do you know how to find the service?
- Do you know what each service is being replaced?
- Is the description of each clear?
- Do you know where to go to resolve any questions?

### Ability

Fundamentals

- Skills and capacity to perform functions
- Physical and mental fitness
- Resource flexibility

Tasks

- Hands-on training
- Shadowing
- Peer coaching

MIT Summit

- Do you have transportation to physically get here?
- Do you have knowledge to get to the service?
- Can you find and use the information 'why'?
- Can you think through how to manage it?
- Can you access the information on demand, when the service?

### Reinforcement

Fundamentals

- Reward people for attempting the change
- Support costs associated with the change
- Impact all behaviors (of all parties)

Tasks

- Management knowledge (set expectations)
- Publicize resources

MIT Summit

- Does your direct manager 'support you, being here'?
- What are your goals and how does this relate to them?
- What are your goals and how does this relate to them?
- What are your goals and how does this relate to them?

Small business

Issues of Risk Management

What's the goal?

What are the risks?

Traditional Schedule Risks

Steps to a Risk

Smart Schedule Productivity

MIT at MIT

Project & Portfolio Management in ServiceNow

### Project and Portfolio Management (PPM)

- At the end of FY12, Portfolio Management migrated from spreadsheets to an integrated system of record: ServiceNow
- Portfolio Reports and Reviews for:
  - Overall Project Health
  - Project Updates
  - Engagement Status
  - Strategic Alignment
  - High-level Scheduling
  - Project Customers
  - Others...

### Portfolio Review

Project Name	Status	Start Date	End Date	Owner	Value
Project A	On Track	2012-01-01	2012-06-30	John Doe	\$1.2M
Project B	At Risk	2012-02-15	2012-08-31	Jane Smith	\$0.8M
Project C	Completed	2011-10-01	2012-01-31	Mike Johnson	\$0.5M
Project D	On Hold	2012-03-01	2012-09-30	Sarah Lee	\$1.5M
Project E	On Track	2012-04-01	2012-10-31	David Kim	\$0.9M

### PPM - Reports

Overall Project Health

Project Updates

Engagement Status

Strategic Alignment

High-level Scheduling

Project Customers

### Main Project Management Screen

Project Details

Project Name: Project A

Status: On Track

Start Date: 2012-01-01

End Date: 2012-06-30

Owner: John Doe

Value: \$1.2M

Progress: 75%

Next Steps: Review progress, update budget.

Strategic alignment

Business problem areas

MIT Summit

MIT at MIT



MIT at MIT



NLIT 2013 Debrief

## *VoIP Cross Collaboration Panel*

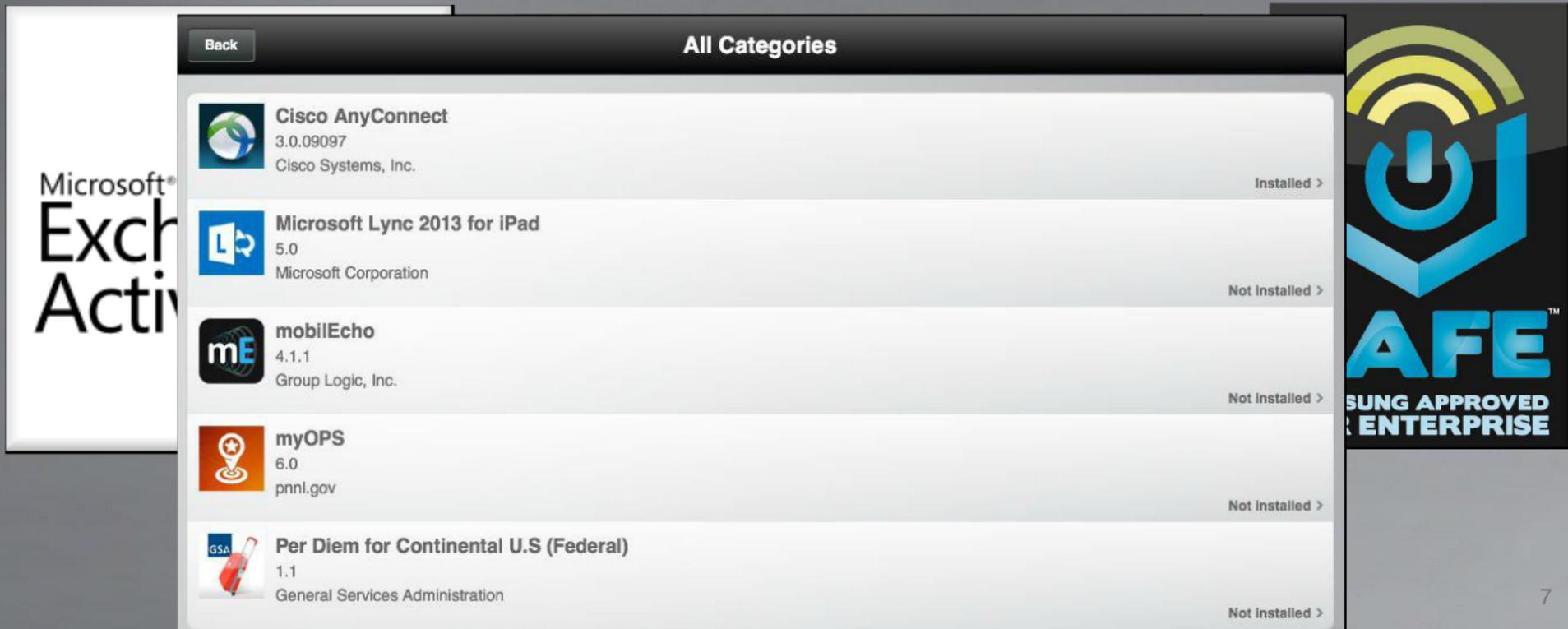
- Labs are considering their 5ESS replacement strategies and VoIP options;
  - People & equipment are getting old;
  - But, technology is still changing rapidly, can wait another year?
  - Funding is an issue;
- Some labs have extensive VoIP installations (e.g. LANL w/ 1000's of numbers), others not so much;
- Question whether everyone/anyone should get a desktop phone;
- Labs with unified communications like it;
- Everyone is using hard lines for emergency phones (hallways, elevators);

## *PNNL on Mobility*

- Really ask them what they want;
- Obsess on the user experience (look at consumer space);
- Keep it absolutely simple;
- Make it personal;
- Say it seven times, seven ways;

# Product Selection

- ▶ MDM (Mobile Device Management)
  - Zenprise, now XenMobile
    - Deciding factors?

A screenshot of an application catalog interface. The title bar at the top says "All Categories" with a "Back" button on the left. The list of applications includes:

- Cisco AnyConnect** (3.0.09097, Cisco Systems, Inc.) - Installed >
- Microsoft Lync 2013 for iPad** (5.0, Microsoft Corporation) - Not installed >
- me mobilEcho** (4.1.1, Group Logic, Inc.) - Not installed >
- myOPS** (6.0, pnnl.gov) - Not installed >
- Per Diem for Continental U.S (Federal)** (1.1, General Services Administration) - Not installed >

On the left side of the screenshot, there is a partial view of a "Microsoft Exchange ActiveSync" logo. On the right side, there is a logo for "AFE" (Approved for Enterprise) with the text "MILITARY APPROVED FOR ENTERPRISE" below it.

# Product Selection

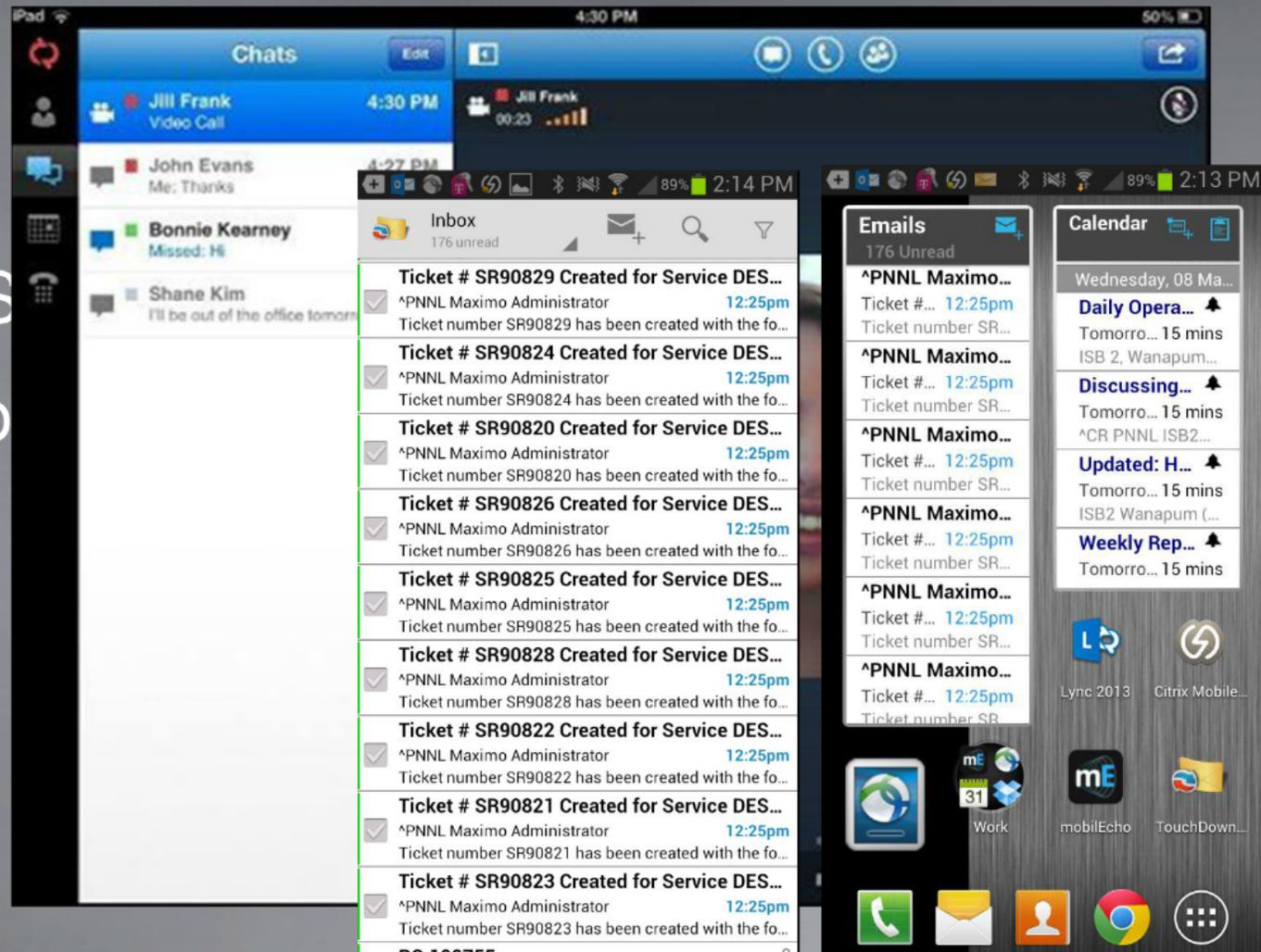
## ▶ Unified Communications

- Lync 2013

## ▶ Email

- Native on iOS

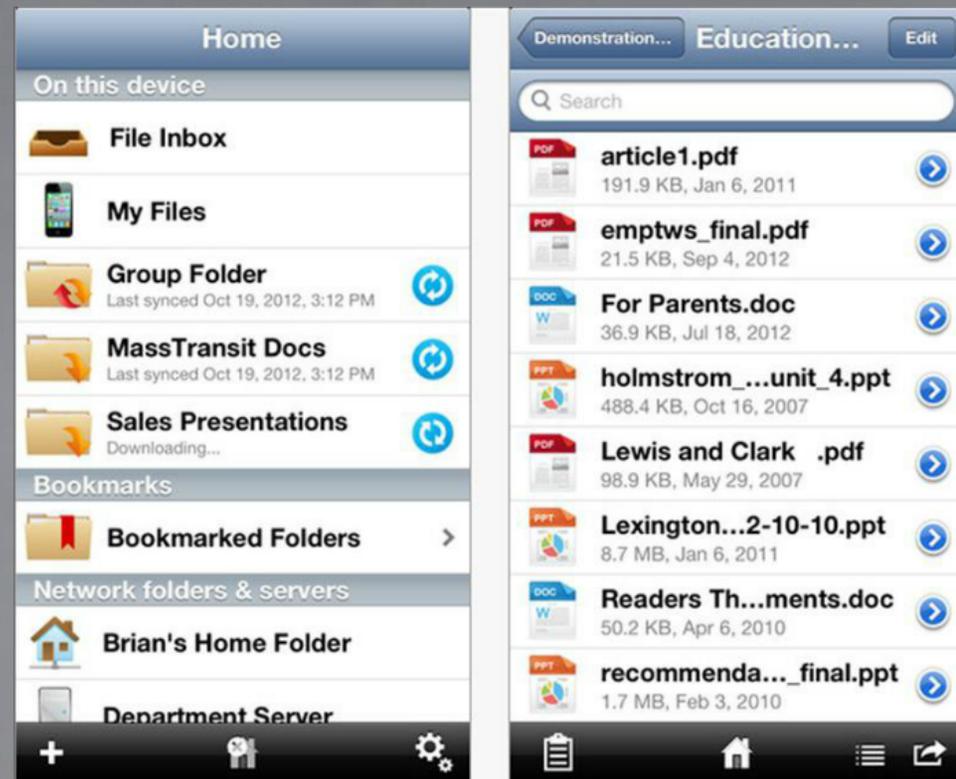
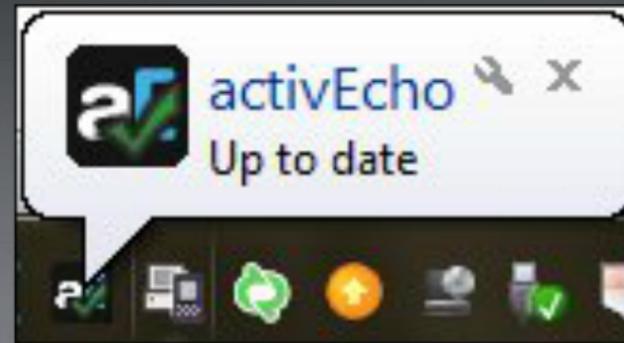
- TouchDown o



# Product Selection

## ► File Sync

- activEcho
- mobilEcho



# What is a User-Centered Experience?

- ▶ PNNL mobile applications are being designed with:
  - User Experience
  - High Value Processes
  - Near-Real-Time Design Patterns

Measure of success:

If our users have to ask how to use the application, we've failed.

# Historical Method

- ▶ Full featured
- ▶ Monolithic
- ▶ Multiple paths
- ▶ User's guide/Training

Time Form ▾
Reports ▾
Approvals ▾

Ruzauskas, Gregory E

**\*\* Previous Form \*\* 01/20/2013 - 01/26/2013**
← 01/26/2013 →

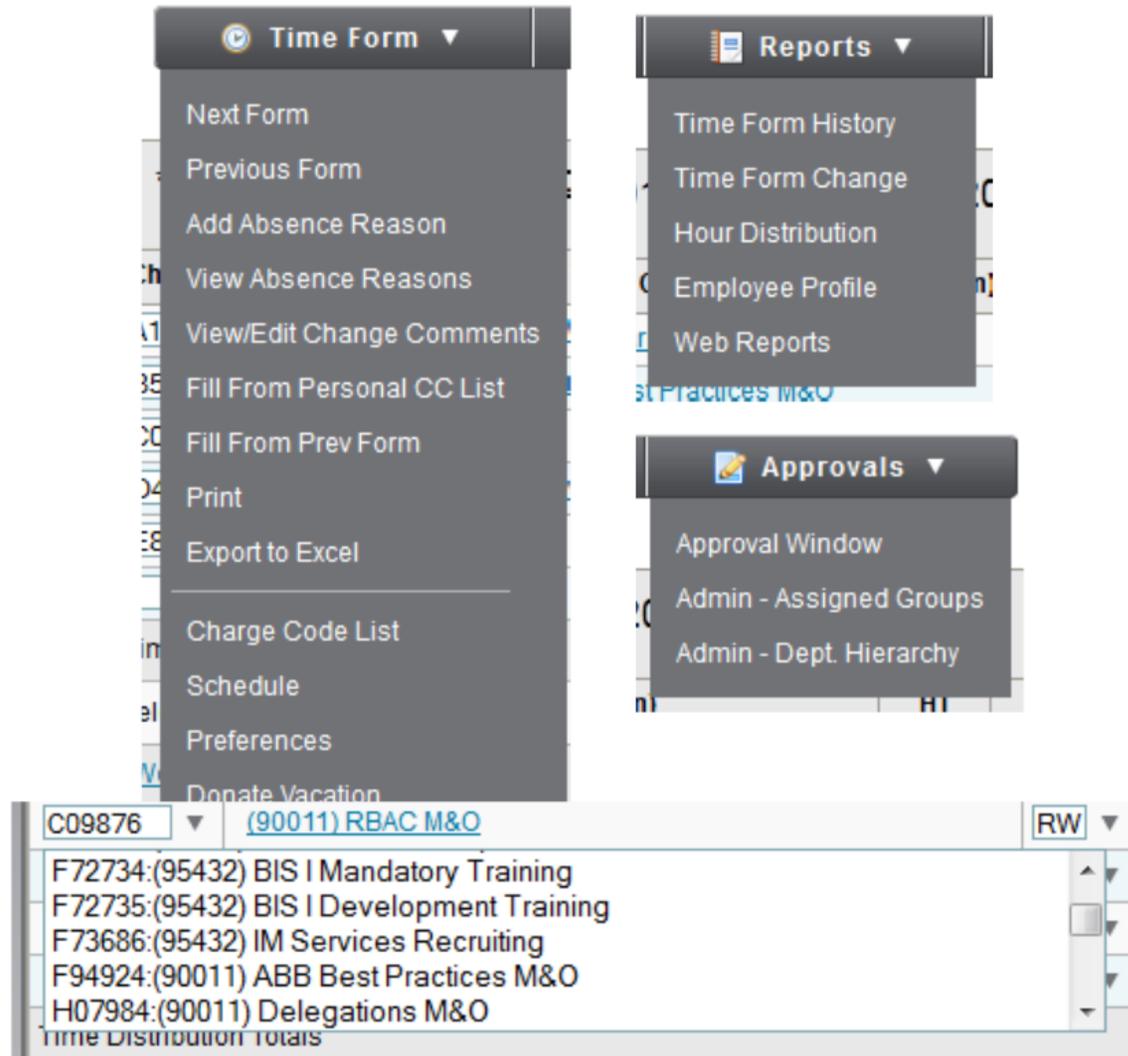
Charge Code	CC Title (Work Authorization)	HT	Sun	Mon	Tue	Wed	Thu	Fri	Sat	Total	
A12345 ▾	<a href="#">(90011) WEB Farm Web Administration</a>	RW ▾	<input type="text"/>	1.5	<input type="text"/>	0.5	<input type="text"/>	<input type="text"/>	<input type="text"/>	2.0	⊖
B56789 ▾	<a href="#">(90011) ABB Best Practices M&amp;O</a>	RW ▾	<input type="text"/>	<input type="text"/>	<input type="text"/>	1.0	0.5	0.5	<input type="text"/>	2.0	⊖
C09876 ▾	<a href="#">(90011) RBAC M&amp;O</a>	RW ▾	<input type="text"/>	<input type="text"/>	1.0	0.5	<input type="text"/>	<input type="text"/>	<input type="text"/>	1.5	⊖
D46583 ▾	<a href="#">(90011) Be Productive Mobile Application Development</a>	RW ▾	<input type="text"/>	7.0	8.0	6.0	8.5	4.5	<input type="text"/>	34.0	⊖
E87378 ▾	<a href="#">(90011) Bioassay</a>	RW ▾	<input type="text"/>	<input type="text"/>	0.5	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	0.5	⊖
<input type="text"/> ▾		<input type="text"/> ▾	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>		⊖
<b>Time Distribution Totals</b>			0.0	8.5	9.5	8.0	9.0	5.0	0.0	40.0	
Telework				<input type="checkbox"/>							
<a href="#">Weekly Schedule</a>			0	9	9	9	9	4	0	40	

Goal Report
Form History
Certify
Save

Total Paid = 40.0 | Total Worked = 40.0 | Completed = Y | Certified = Y | Approved = Y

# Why this doesn't work for Mobile

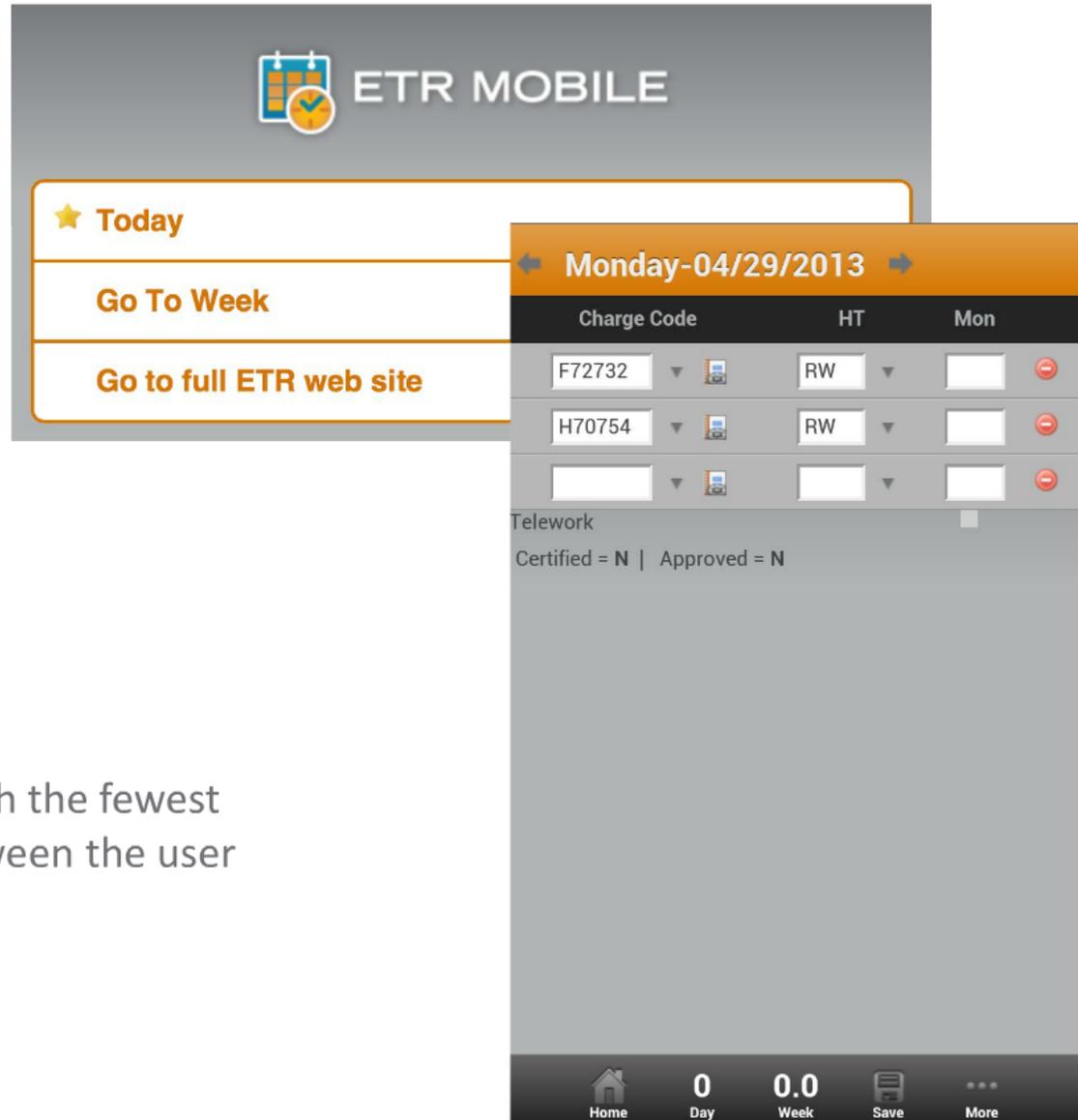
- ▶ Too many options
- ▶ Users get lost
- ▶ Too much information



The screenshot illustrates a mobile application interface with three dropdown menus and a main content area. The 'Time Form' menu is open, displaying a long list of options: Next Form, Previous Form, Add Absence Reason, View Absence Reasons, View/Edit Change Comments, Fill From Personal CC List, Fill From Prev Form, Print, Export to Excel, Charge Code List, Schedule, Preferences, and Donate Vacation. The 'Reports' menu is also open, showing: Time Form History, Time Form Change, Hour Distribution, Employee Profile, and Web Reports. The 'Approvals' menu is open, showing: Approval Window, Admin - Assigned Groups, and Admin - Dept. Hierarchy. The main content area shows a list of items with a scrollbar on the right. The list items are: C09876 (90011) RBAC M&O, F72734:(95432) BIS I Mandatory Training, F72735:(95432) BIS I Development Training, F73686:(95432) IM Services Recruiting, F94924:(90011) ABB Best Practices M&O, and H07984:(90011) Delegations M&O. Below the list is a section for 'Time Distribution Totals'. The interface is cluttered with many options and information, which is why it doesn't work well for mobile devices.

# Requirements for Mobile Design

- ▶ Main focus
- ▶ Single path
- ▶ Naturally intuitive



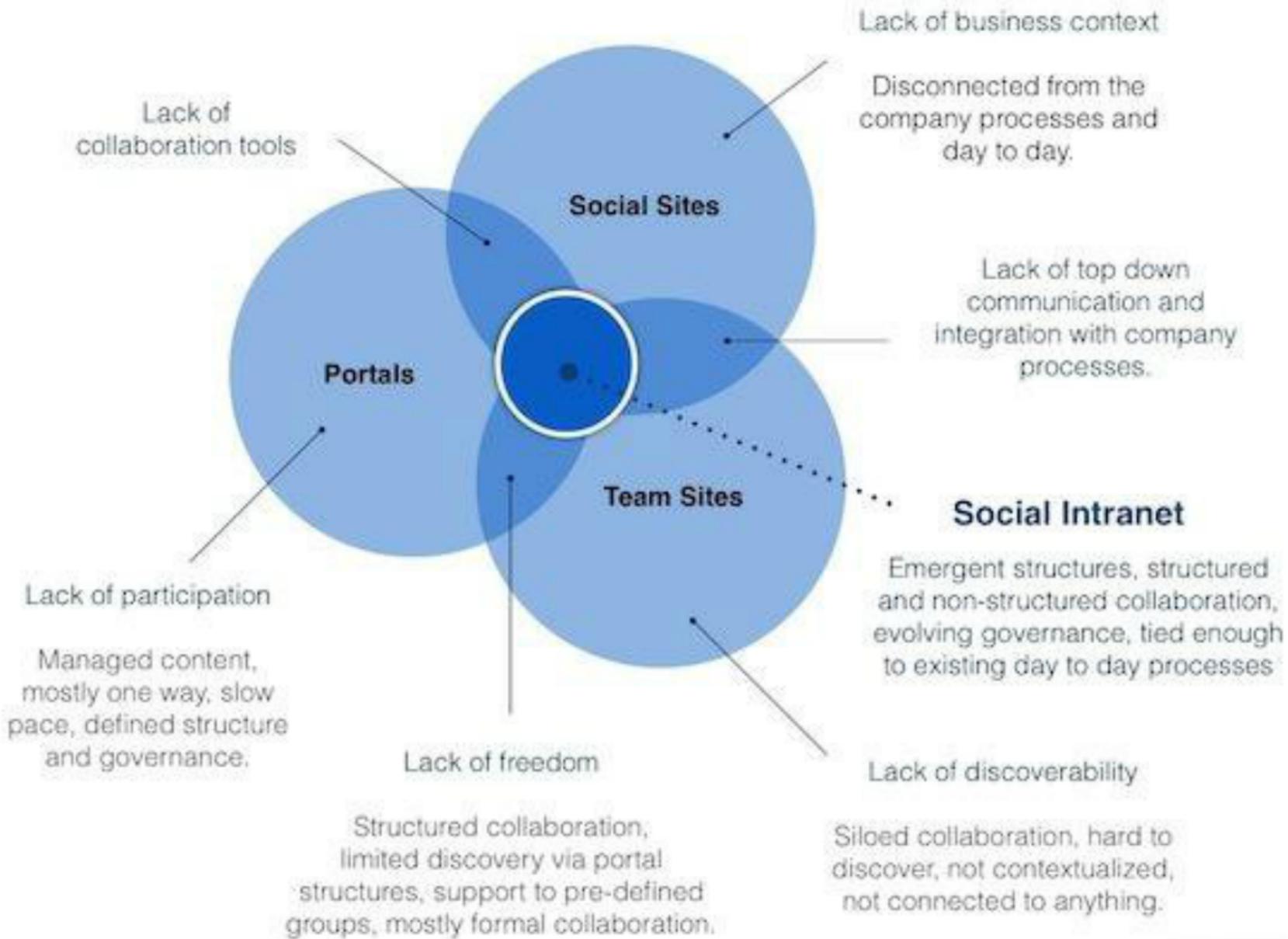
“The best journey is the one with the fewest steps. Shorten the distance between the user and their goal.” – A. Lund

- ▶ 80-90% Use Case
- ▶ High value
- ▶ Happy path

ETR Main Goals:

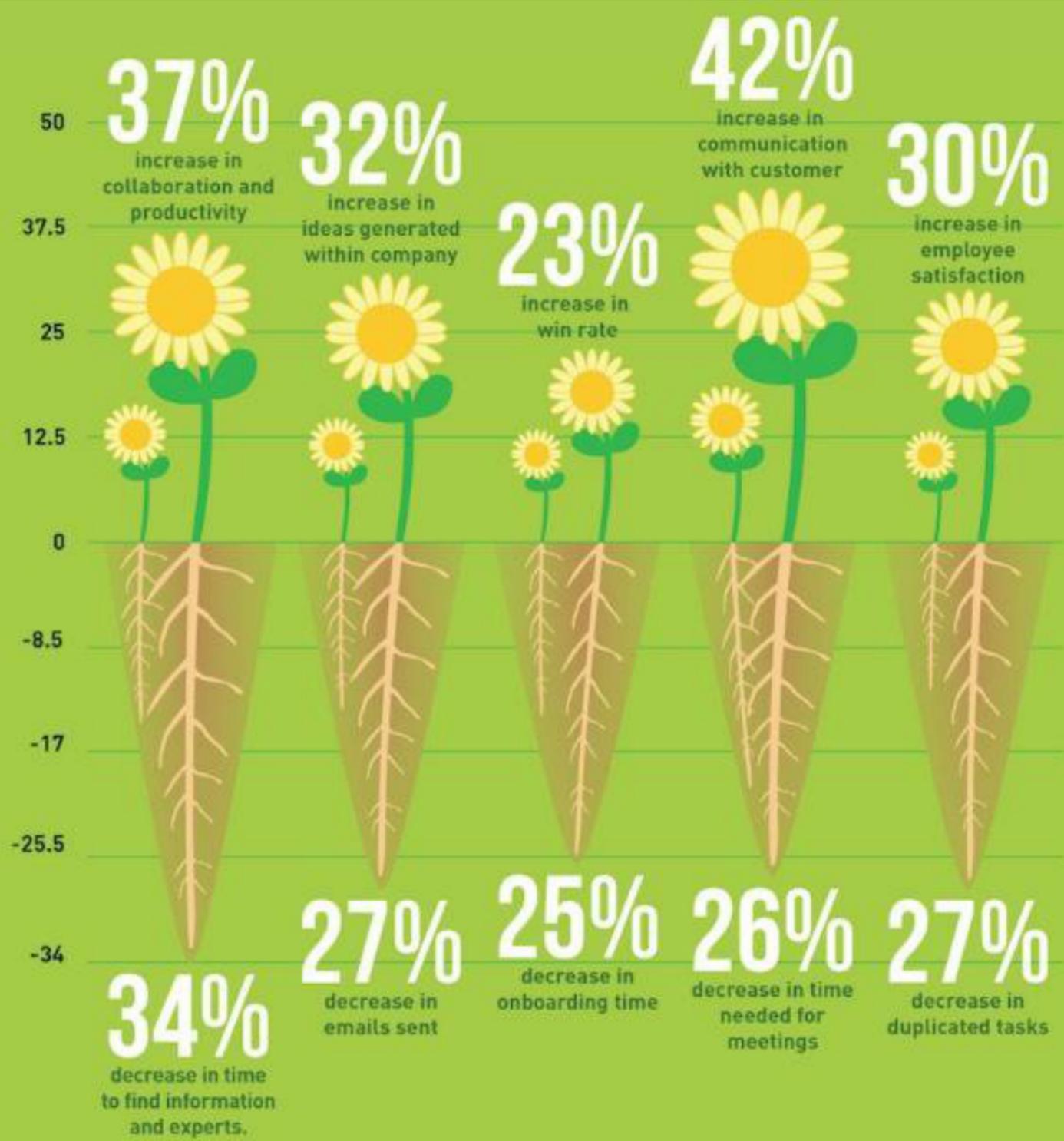
- Allow the user to enter their time for the week
- Allow the user to certify their timecard for the week

# *Social Intranets*



# When can you call an intranet 'social'?

- All features of traditional intranets and portals  
PLUS:
- Multiple (but not all) social tools are available (blogs, wikis, curation/ recommendation, presence, etc.)
- Open opportunity to use social tools for all employees
- Social options are woven into content consumption (likes, @jane, comments, ratings, etc.)



# Enterprise ecosystem now

- Portals – lack participation, mostly one-way, slow moving
- Team sites (Sharepoint) – sliced collaboration, discovery difficult, lacking context
- Social sites (Mysites, Plug) – disconnected from day-to-day business processes
- Social intranet (not production yet) – structured and non-structured communication, somewhat tied to business processes, opportunity for emergent structures

# Recurring problem areas

## Primary concerns

- **Search**
- **Collaboration**
- **Awareness of the IT environment**
- **Accuracy of information**

## Other common themes

- Platform and browser compatibility
- Sharepoint/MySites
- Portal
- Access to information

## Overall

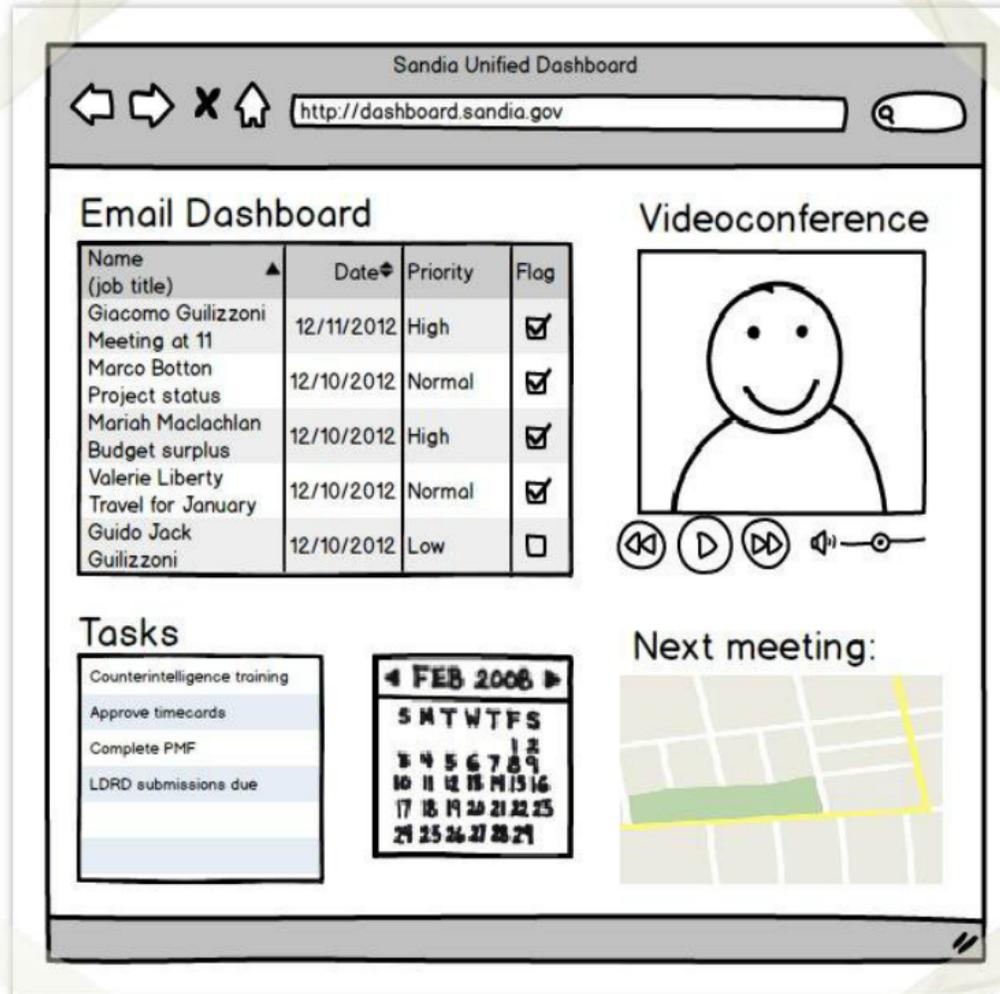
- Usability and lack of understanding of the end user experience.

# A Vision for Unified Communications and Collaboration

- Bring together information and actions, improve productivity
- Web-based foundation
  - HTML5 core functionality
  - Portable to standalone apps and mobile
  - Future-proof investment
- Data Awareness Layer
  - Aggregate information streams
  - Distribute streams to other systems
- UCC Dashboard
  - Web-based interface, analogous to a future version of the Techweb home page
  - Information and actions available at your fingertips
  - Intuitive, predictive interface
  - Centralized source of activity streams



# UCC Dashboard



Sandia Unified Dashboard

http://dashboard.sandia.gov

### Email Dashboard

Name (job title)	Date	Priority	Flag
Giacomo Guilizzoni Meeting at 11	12/11/2012	High	<input checked="" type="checkbox"/>
Marco Botton Project status	12/10/2012	Normal	<input checked="" type="checkbox"/>
Mariah Maclachlan Budget surplus	12/10/2012	High	<input checked="" type="checkbox"/>
Valerie Liberty Travel for January	12/10/2012	Normal	<input checked="" type="checkbox"/>
Guido Jack Guilizzoni	12/10/2012	Low	<input type="checkbox"/>

### Videoconference



Videoconference controls: Play, Stop, Next, Mute, Unmute

### Tasks

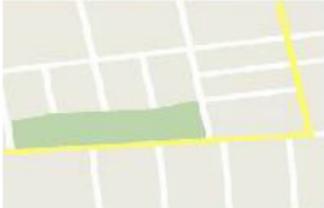
- Counterintelligence training
- Approve timecards
- Complete PMF
- LDRD submissions due

### Calendar

◀ FEB 2008 ▶

S	M	T	W	T	F	S
					1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	

### Next meeting:



# *Scrum & Risk Management*

# What's the point?

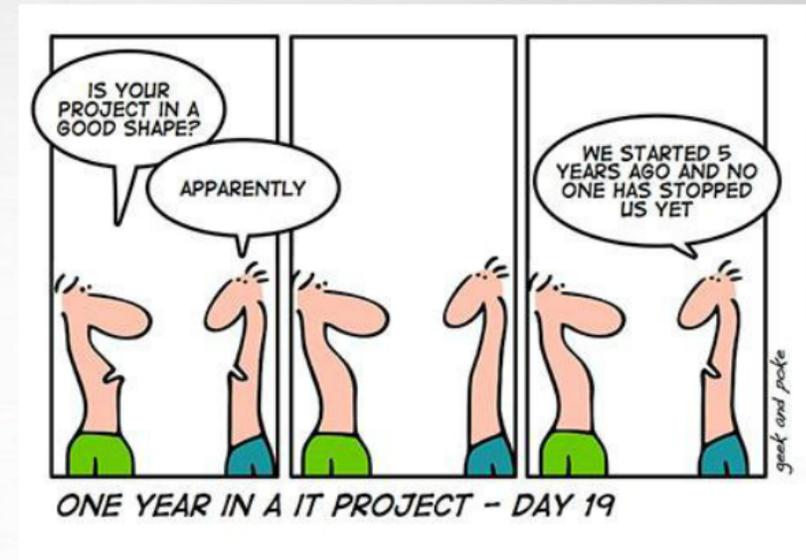
*Could it be that...*

- Traditional risk management is an exercise in futility, because you just DON'T KNOW?
- Spending the time and effort in identifying, scoring, cataloging, evaluating, mitigating, managing, etc. these **potential risks** detracts from value-adding activities?

***So...is there a better way to handle risk?***

## More reality...

4. According to 586 respondents to an email survey sponsored by [Dr Dobbs Journal](#) (2007 – 2011)...
- 70% of respondents had been involved in a project they knew would fail right from the start
  - Success rates for Agile projects 72%; success rate for traditional approaches 63%



***So, if traditional project management includes formal risk management and...yet...these efforts still perform below agile-based projects, then...***

# Traditional Schedule Risks

“Schedule risk is the likelihood of failing to meet schedule plans and the effect of that failure.

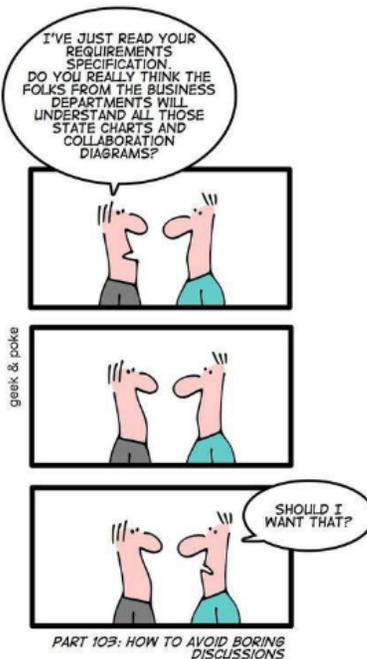
Risks are inherent in all aspects of a program and the program schedule is not exempt. Uncertainty exists in every schedule. It is impossible to predict, with complete confidence, the length of time necessary to complete an activity, meet a milestone, or deliver a system.

...Schedules that are developed in later phases of the program will be based on more information and analysis, but will still lack complete certainty; hence the potential for schedule risk.”

<https://acc.dau.mil/CommunityBrowser.aspx?id=17745>

# Scope as a Risk

PROJECT MANAGEMENT MADE EASY



“Every failing project I've seen has had an informal scope of "the sun, the moon, the sky and the stars." In other words, management and the end users are convinced that they must have and will receive the perfect solution right out of the gate. They never get to the gate...”

[http://www.agilepec.com/Key\\_Practices/Scope\\_and\\_risk\\_management.htm](http://www.agilepec.com/Key_Practices/Scope_and_risk_management.htm)

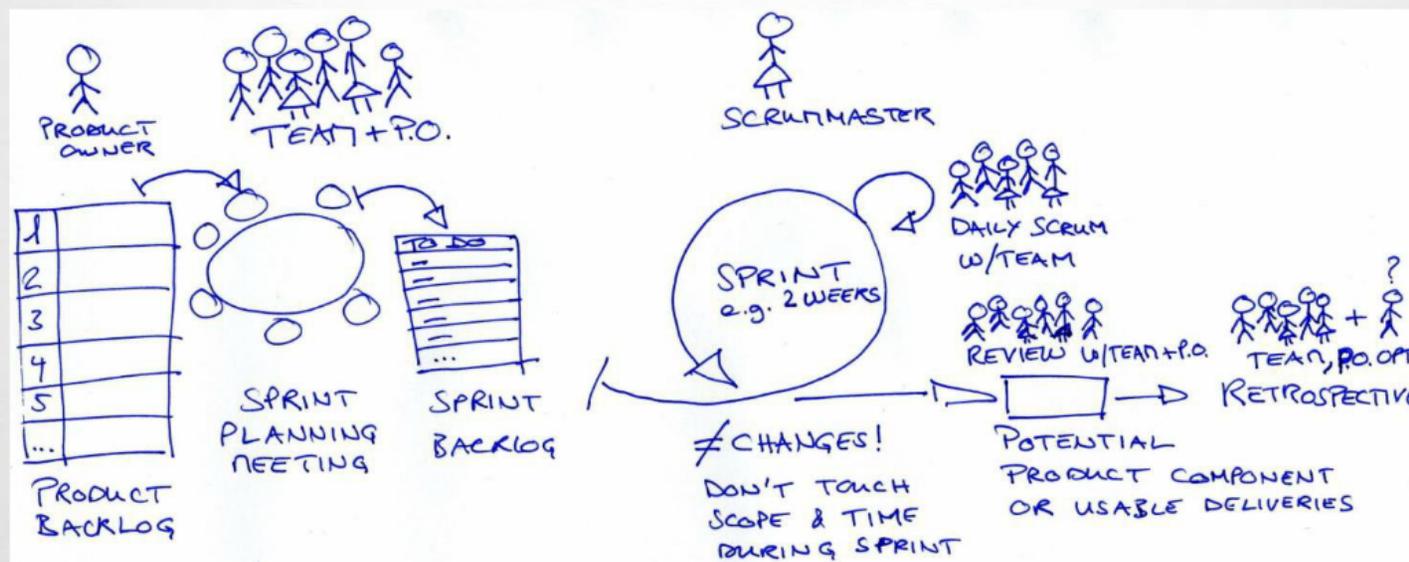
“How does one actually know if one has arrived at the desired destination? If we knew where we were going and how we were going to get there, the answer would be simple. But too often a complex project is undertaken without clear goals and direction. These "minor" details are haplessly left to sort themselves out once the project is underway.”

[http://www.imsi-pm.com/home/library/scope\\_creep.pdf](http://www.imsi-pm.com/home/library/scope_creep.pdf)

# Scrum (revisited) and “Scope Creep”

## Scrum further tamps scope risk by...

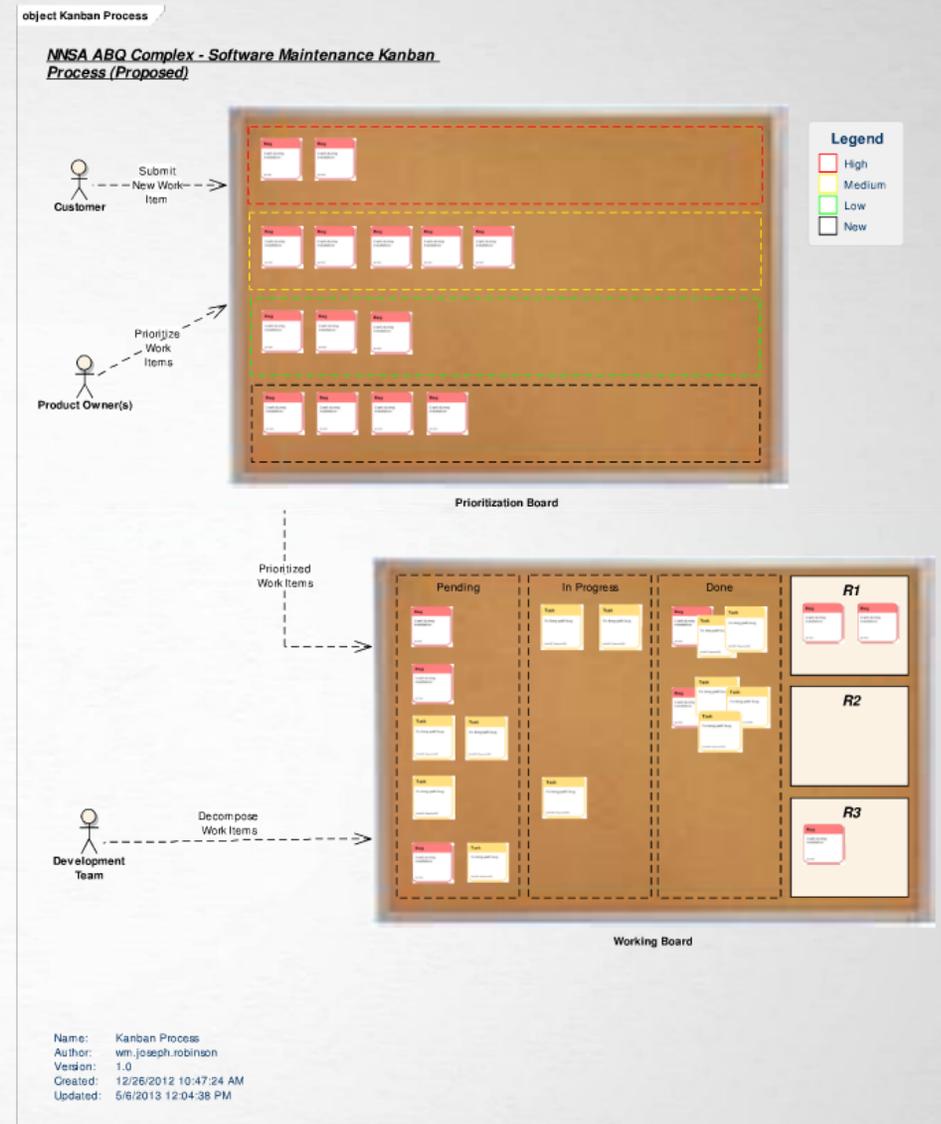
- Engaging customers in solutions development processes, which provides inherent scope and change control
- Ensuring requirements are prioritized by the customer (i.e. Product Owner) and reviewed at each end-of-iteration review
- Supporting...and even embracing... change as the customer can quickly prioritize new requirements



# Kanban for TCO Control

## Kanban benefits:

1. Bottlenecks become clearly visible in real-time. This leads people to collaborate to optimize the whole value chain rather than just their part.
2. Allows you to limit work across every stage of workflow and ensures at all times planned work is realistic giving better control
3. Encourages teams to develop the core values and focused ways of working like Focus, Openness, Commitment, Courage and Respect
4. Improves workflow to execute a task at all times along with improved responsiveness to change
5. Brings in a culture to deliver value than just any software if done right and reduces waste



# Sprint Reviews and Product Quality

“The central point of discussion [during the Sprint Review] is the Product Increment completed during the Sprint. Since the Stakeholders are those who have a "stake" in the results, it is generally wise and helpful for them to attend this meeting. This is an informal meeting to take a look at where we are and to collaborate on how we might go forward.”

<http://agileatlas.org/atlas/scrum>

*Sprint reviews enable product quality by allowing stakeholders to ...*

1. Voice any comments, observations, or criticisms regarding the product increment.
2. Identify functionality that wasn't delivered or wasn't delivered as expected and request that such functionality be placed in the Product Backlog for prioritization.
3. Specify any new functionality that occurs to them as they view the presentation and request that the functionality be added to the Product Backlog for prioritization.

# What we discussed today...

We suggested a risk management approach that centers on enhanced control of the triple constraint (time, cost, and scope), which we further suggest represent the primary customer risks. Furthermore, we suggested that each point in the triple constraint can be supercharged through the use of specific agile-based methods. Specifically, we discussed...

1. Scrum for enhanced schedule control
2. Agile Modeling for enhanced scope control
3. Rapid estimation (via UCP or similar) and Kanban for enhanced cost control
4. Scrum-like reviews (i.e. End-of-Iteration Reviews and Retrospectives) for enhanced quality control

***And now it's your opportunity for questions, comments, thoughts, etc....***

# *Project & Portfolio Management in ServiceNow*

# Project and Portfolio Management (PPM)

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- **At the end of FY12, Portfolio Management migrated from spreadsheets to an integrated system of record: ServiceNow**
- **Portfolio Reports and Reviews for:**
  - Overall Project Health
  - Project Updates
  - Engagement Status
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  - Project Customers
  - Others...

# Portfolio Review

[Add content »](#)

## Portfolio Overview

All projects

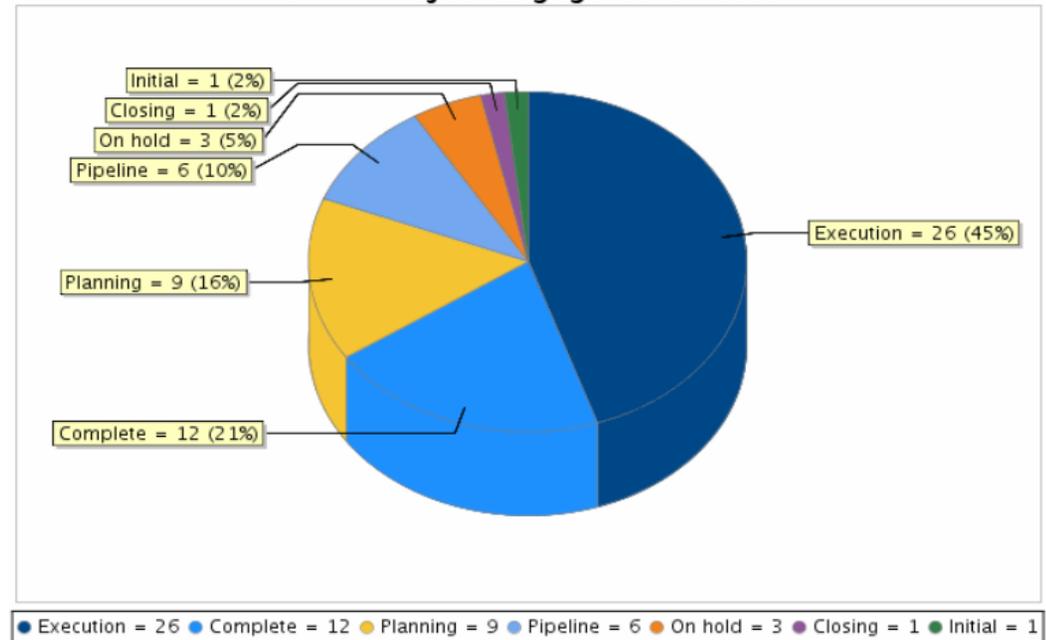
	 Short Description	 Overall Health	 Open issue / Comments	 Action Items	 Engagement Status	 Project Planned
  	<a href="#">Property Management (SSC)</a>	Yellow	1/18/13: Sheila has made significant pro...		Execution	2013-03-31
  	<a href="#">User Acceptance Testing Environment</a>	Yellow	1/15/12: Still on hold for A Hoying's ti...		Execution	2013-02-28
  	<a href="#">DNS Sinkhole</a>	Yellow	1/24/13: Implementation date moved up to...	BG - IRQ	Execution	2013-02-05
  	<a href="#">IPv6</a>	Yellow	1/29/13: webprod went live last Friday. ...		Execution	2013-06-30
  	<a href="#">Web Application Security Project (WASP)</a>	Green	1/29/13: The WASP project is back on tra...		Execution	2013-06-12
  	<a href="#">Oracle R12 Upgrade (SSC)</a>	Green	1/28/13: Go no\Go decision made on 1/24 ...		Execution	2013-02-28
  	<a href="#">Private Cloud Infrastructure (FlexPod)</a>	Green	1/29/13: Team had a project closeout cal...	3.Inventory hardware already purchased &...	Execution	2013-03-31
  	<a href="#">Data Warehouse Phase 2 - (SSC)</a>	Green	1/21/13: NQuIRE change control board co...		Execution	2013-03-31
  	<a href="#">Simplified Sign On (SSO)</a>	Green	1/28/2013-Andrew is currently working wi...		Execution	2013-06-30

# PPM - Reports

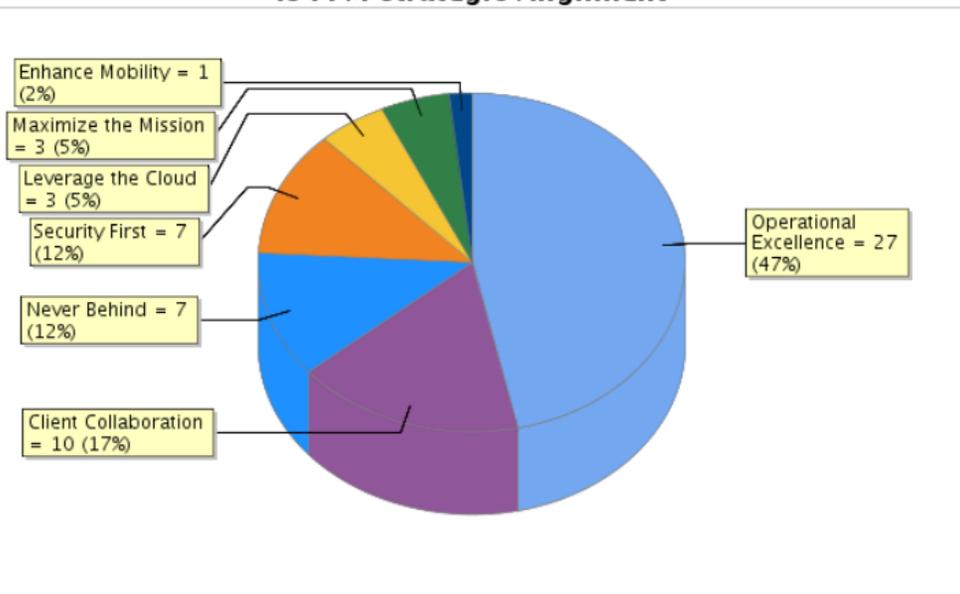
Active Projects - Overall Health	Count	Percent
Green	32	86%
Yellow	5	14%
<b>Total</b>	<b>37</b>	<b>100%</b>

Projects - Engagement Status	Count	Percent
Execution	24	41%
Complete	12	21%
Planning	11	19%
Pipeline	6	10%
On hold	3	5%
Initial	2	3%
<b>Total</b>	<b>58</b>	<b>100%</b>

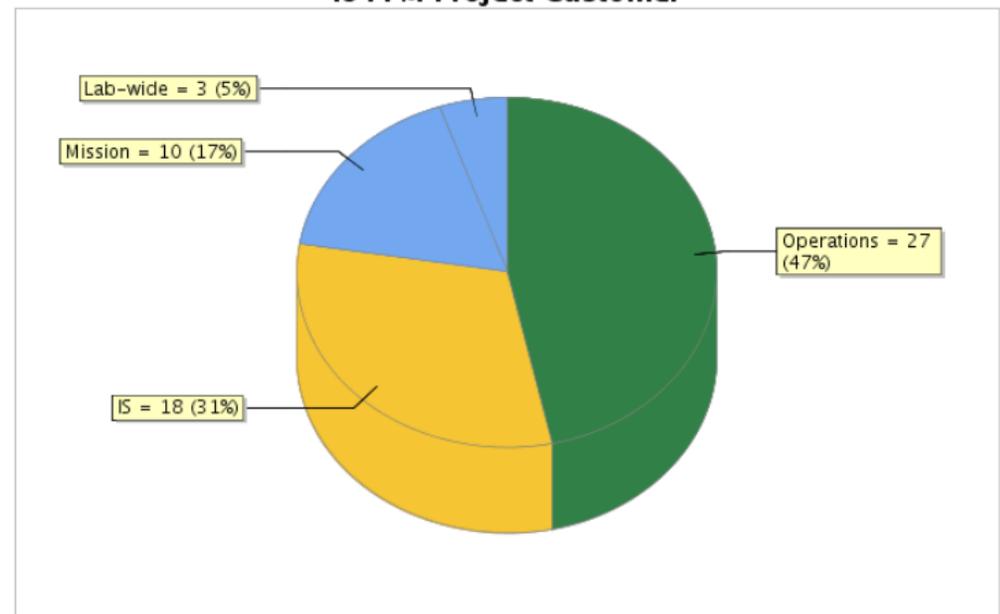
IS PPM Project Engagement Status



IS PPM Strategic Alignment



IS PPM Project Customer



# Main Project Management Screen

← Project [Advanced view] | = Required field
Update
Assign to me
Delete Project

<p><b>Short Description:</b> Simplified Sign On (SSO) </p> <p><b>Number:</b> PRJ0000043</p> <p><b>Assigned to:</b> Lynne Ly (lly) </p> <p><b>Project manager:</b> Lynne Ly (lly) </p> <p><b>Project Lead:</b> Andrew Hoying (ahoying) </p> <p><b>Portfolio:</b> Enabling Technologies </p> <p><b>Strategic Alignment:</b> Client Collaboration</p> <p><b>Engagement Status:</b> Execution</p> <p><b>Percent Complete:</b> 80</p> <p><b>Overall Health:</b> Green</p>	<p><b>Project Sponsor(s):</b> Robert Osborn (rosborn) </p> <p><b>Project Sponsor Organization(s):</b> 3100</p> <p><b>Time constraint:</b> Start on specific date</p> <p><b>IS Group Owner:</b> Cyber</p> <p><b>Project Customer:</b> Operations</p> <p><b>Project Approved?:</b> Yes</p> <p><b>Project Approval Date:</b> 2012-09-10</p> <p><b>Project Planned Start:</b> 2012-09-10</p> <p><b>Project Planned Finish:</b> 2013-05-14</p> <p><b>Est Person Weeks:</b></p>
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**Overall Health Comments:**

**Project Objective:**  
We will implement an authentication system that will be beneficial to the largest number of systems and applications possible. It will support Kerberos, SAML and two factor

**Project Value:**  
Project will provide easier access to our many services that our customer access; fewer sign-ons.

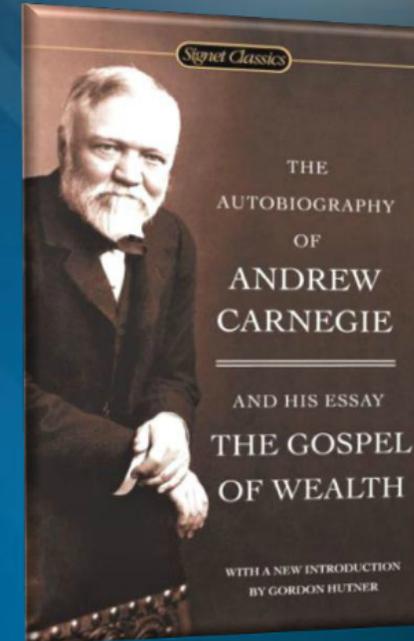
Notes
Cost
Schedule
Variance
Cyber
Prioritization
Governance
Project Artifacts
Portfolio Review
Risk Rating

# *Organizational Change Management & ADKAR*

## ***Redefining the Goal***

“*Success is not defined by being on budget and on time – those are simply requirements. Success is delivering a product the customer wants and they begin to use.*”

– *Denise Stephens  
(to IM Directors and Managers)*



***“Real and  
Permanent Good”***

**PLAN**

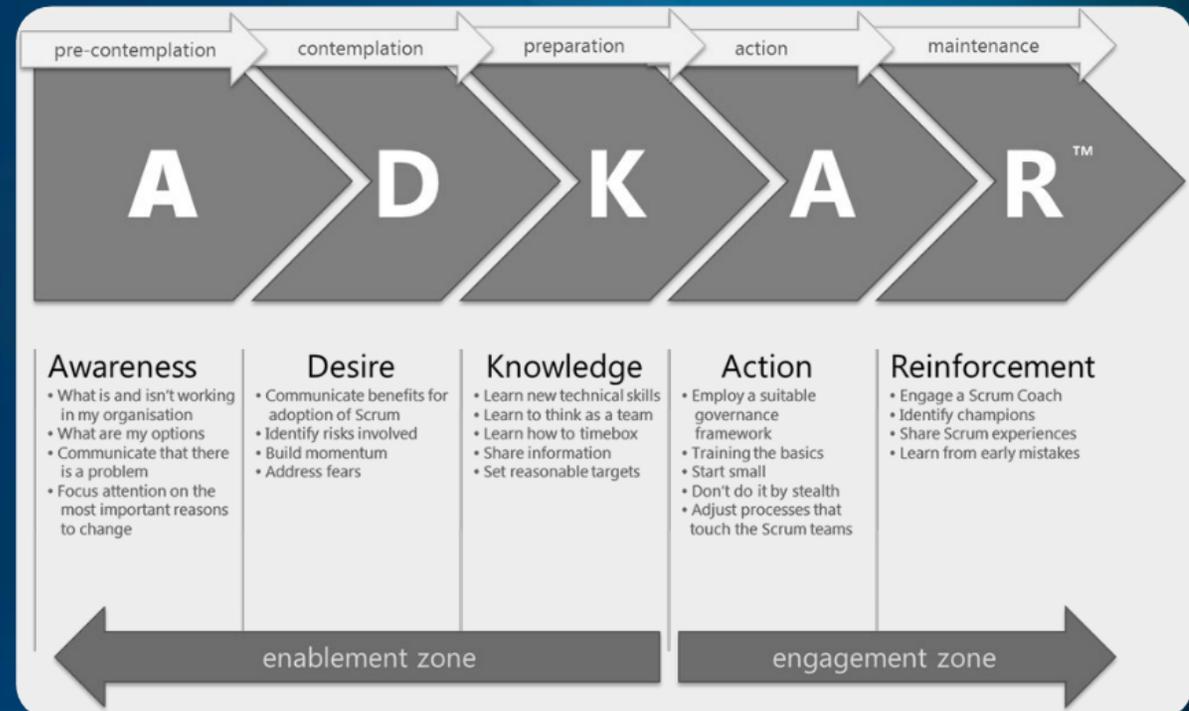
**EXECUTE**

**MEASURE**

# Organizational Change Management

- More than just communications
- Formalized at INL during 2013
- Ultimate Objective: To provide adoption of products and services by customers

*Prosci*



# Awareness

## Fundamentals

- Feed the need for change/event/implementation
- Knowledge something is about to be done



## Tools

- Company announcements
- Posters
- Upper staff meetings



- Are you aware of NLIT happening? (hopefully!)
- Do you understand why NLIT is being held?

# Desire

## Fundamentals

- They have to want it
- Understand the benefits “why”
- Sponsorship, Sponsorship, Sponsorship....



## Tools

- Two-way communications
  - Direct dialogue
  - Management engagement



- Why are you here?
- Do you know what you expect to learn?
- Are you here because you want to or because you were assigned to be?

# Knowledge

## Fundamentals

- Education on how to use the new service
- Education on how to transition to the new service
- Self-confidence in taking the first step



## Tools

- Handouts
- Training



- Did you know how to find the venue?
- Do you know where each breakout session is being held?
- Is the description of each class clear?
- Do you know where to go to resolve any questions?

# Ability

## Fundamentals

- Tools and access to perform functions
- Physical and Logical access
- Necessary hardware



## Tools

- Human Factors Review
- User testing
- PMI oversight



- Did you have transportation to physically get here?
- Do you have necessary lodging accommodations?
- Can you hear and see the presentation okay?
- Do you have logical access to internet, etc?
- Can you access the information on demand (after the session)?

# Reinforcement

## Fundamentals

- Reward people for attempting the change
- Support costs associated with the change
- Impact allowance (think quotas)



## Tools

- Management meetings (set expectations)
- Published metrics



- Does your direct management support you being here?
- When you return, will you have a formal chance to share what you learned?
- Will you have to work overtime next week to make up for being gone this week?

# Interesting Products

Dell/Quest Identity Management:

<http://www.dell.com/us/business/p/quest-software-identity-access-management/pd>

Tableau Visual Analytics:

<http://www.tableausoftware.com/>

Infor EAM Asset Management

<http://www.infor.com/solutions/eam/>



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