

EFI Change Management Process

Process Overview

The EFI Change Management Process is an ongoing series of activities designed to ensure that your organization is prepared to adopt new structures, processes and tools to maximize the return on your investments. The emphasis is on creating an environment to support a sustainable method of future operations while helping your people adapt during the transition.

The process is tailored to the specific priorities and objectives of the implementations and focuses on identifying barriers to change and leveraging the change agents that exist in your organization. EFI Change Management operates on four key areas:

1. Organization: Are the people aligned with the processes?
2. Preparation: Is the infrastructure in place to support ongoing operations?
3. Readiness: Are the people prepared to alter their behaviors and adopt new methods?
4. Effectiveness: Are there measures in place to understand whether the change is successful?

Success Factors

This process requires alignment with the objectives of the business. To ensure alignment, it needs:

- Senior leadership sponsorship; driving change from the top.
- Clear definition of objectives and priorities with measureable KPIs to identify areas of focus.
- Endorsement of change agents with an openness and readiness for change.
- Evaluation with long-term view to address the most important challenges avoid the distraction of the most recent challenges.

Change Management Process

EFI Change Management is a combination of one-time and ongoing activities intended to support the implementation of new procedures, tools, and capabilities. Each of the four main areas of focus, Organization, Preparation, Readiness and Effectiveness, has specific deliverables designed to ensure that the future organization is aligned with the Business Objectives and can operate effectively in a new environment. The activities are tailored to the business and will vary in duration based on the scope of the project driving the change. Change Management milestones will be identified and synchronized with the primary

project plan, creating clear actions with measurable results that will inform the overall project.

Area 1: Organization

This area examines the impact of future state processes on the organization's structure, including employees, equipment and locations. The organization is examined to ensure that each process area has sufficient staff enabled to expertly execute in all roles and responsibilities.



Departmental and individual goals and incentives are reviewed to ensure sustainable alignment with the Business Objectives. This evaluation includes:

- Organization Structure – Compare roles in current and future state to ensure proper staffing levels and alignment
- Job Description/Task List – Compare specific tasks in current and future state roles to identify changes in daily activities that will require additional skills or training
- Physical Structure – Review overall company structure to ensure employees and equipment are in the right locations to support the future state organization
- Incentive Evaluation - Review incentives/KPIs for alignment with system adoption, recommend changes to KPIs as needed to drive change.

Area 2: Preparation

After the future state definition, it is time to prepare the environment. This area focuses on identifying the infrastructure changes necessary to support ongoing operations, including preparation of SOPs, training plans, documentation, and even physical workspace transformations.



Implementation projects are focused decision-making, software configuration, and core team training. End user training is often treated as a one-time activity, however once the implementation ends the organization must be able to repeat its training as employees

change roles and new employees enter the business. Preparation activities create the tools required to enable a sustainable program. Depending on the project being supported, activities may include:

- SOPs – Creation and validation of standard operating procedures for the future state, including processes for ensuring sustainability
- Training – Development of role-based training plans and custom curriculum for trainers and/or end users, including change management training
- Workspace Transformations – Creation of plans based on organization research to align physical workspaces and organization structures to best support future state workflows
- New System Adoption and Sustainability – Specification of processes and systems to encourage user adoption of future state workflows and tools

Area 3: Readiness

Readiness is a set of ongoing activities designed to ensure that employees understand what the transformation project is doing and why. The focus is on the ability and willingness of people to change. Even passive resistance can prevent a transformation project from succeeding; therefore it is important to manage the human side of the implementation.



These activities are applied in three areas:

1. Individual Alignment: Identifying and addressing the concerns of detractors while leveraging the backing of supporters.
2. Education: Ensuring employees understand the motivations and benefits of the change.
3. Communications: Enabling leaders and managers to describe the change and address employee concerns.

The motivation for change is developed through communication programs conducted at regular intervals. These communications provide the staff with visibility to the current activities of the project, descriptions of the future state, and the connection between the benefits and the objectives of the business. Gathering feedback is critical, and when used properly this feedback creates trust and buy-in by creating a two-way conversation about the project. Activities in this area may include:

- Internal Marketing – Determine best methods for internally marketing and communicating project-critical information out to the team, encouraging user adoption of future state workflows and tools
- Enable User Feedback – Create mechanism for gathering user feedback and establish feedback checkpoints in conjunction with project milestones.
- Earn Buy-In from Detractors – Develop mechanism for identifying and earning buy-in from end users who are negative toward the project changes

Area 4: Effectiveness

The development and use of KPIs provides a meaningful assessment of the effectiveness of Change Management activities.

- Training tests and certifications provide insight the effectiveness of the Preparation activities.
- Employee surveys and feedback are used to gauge the effectiveness of the Readiness activities.



Both sets of measurements will help determine whether more or less Change Management is required. The ongoing evaluation of Effectiveness enables proactive adjustments to be implemented during the transformation project instead of reacting to problems at the end.

- Measure Effectiveness – Create appropriate KPIs for measuring the effectiveness of Change Management specifically and the project overall
- Utilize Feedback – Utilize user feedback to improve the project during rollout, informing work on future state workflow processes, documentation, curriculum, or other areas of concern.

Conclusion

EFI's Change Management process creates a custom plan and operational milestones for change based on your organization's KPIs. Employees are your organization's most valuable assets and a lack of active change management will set them up to fail in their new work environment. Our process includes gathering feedback and using it to leverage your employee knowledge and experience through the transition. EFI is here to help you win over internal detractors and help you maximize the return on your investments while minimizing the impact to operations.