

innovia  
CONSULTING



Managing the People Side of a  
D365BC (or any) Implementation

# Today's Presenter



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Awareness of the Need to Change is the First Step



# Learning Objectives



Define change management (CM)



Recognize how to apply CM to your D365BC Implementation



Understand the value of CM



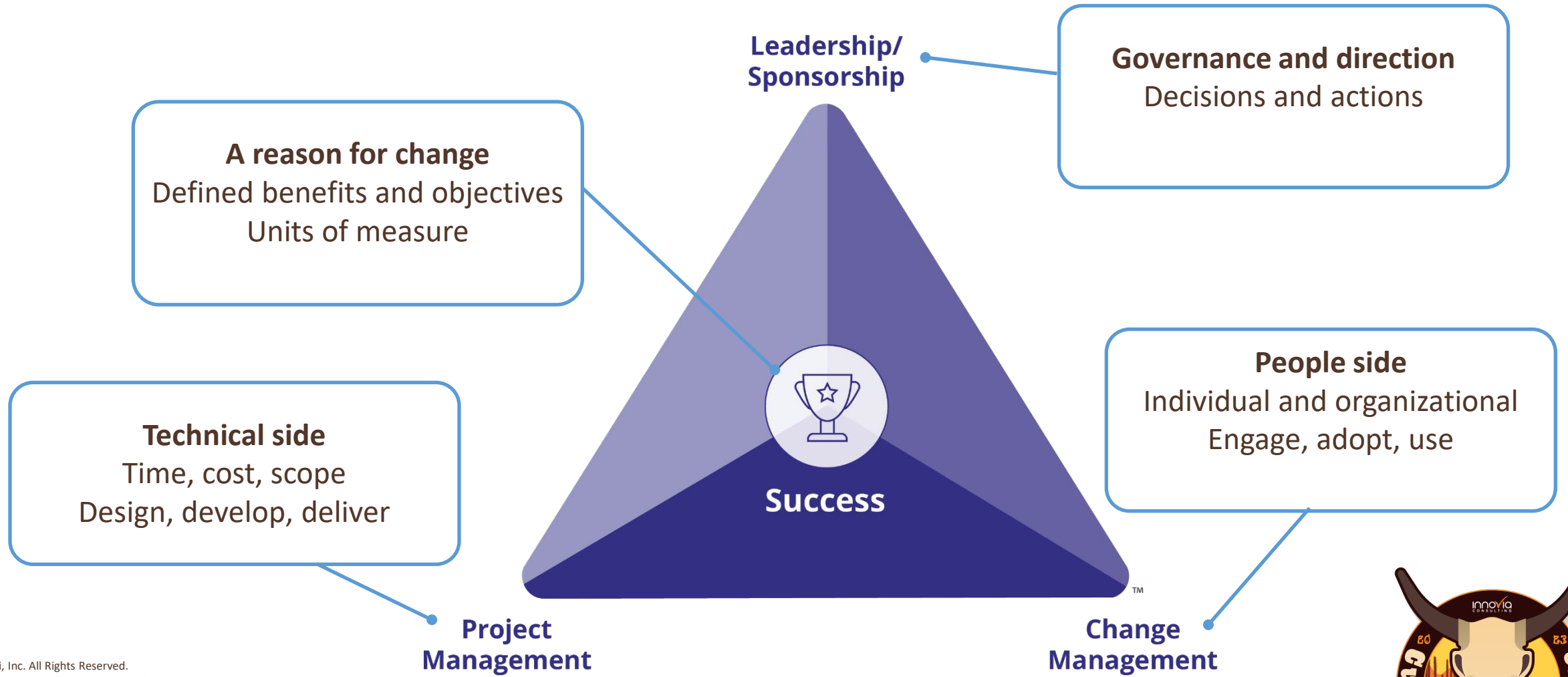
Realize CM application effectiveness



# What Is Change Management And Why Is It Valuable?



# PCT Model: Critical Aspects For Success



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# Define Change Management

## On a Project Level

Change management is the application of a structured process and set of tools for leading the people side of change **to achieve a desired outcome.**

## On an Organizational Level

A leadership competency for enabling change within an organization.

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A strategic capability designed to increase change capacity and responsiveness.



# How Organizations Often Handle Change

M

T

W

R

F



**An email** on Monday

**for training** on Tuesday

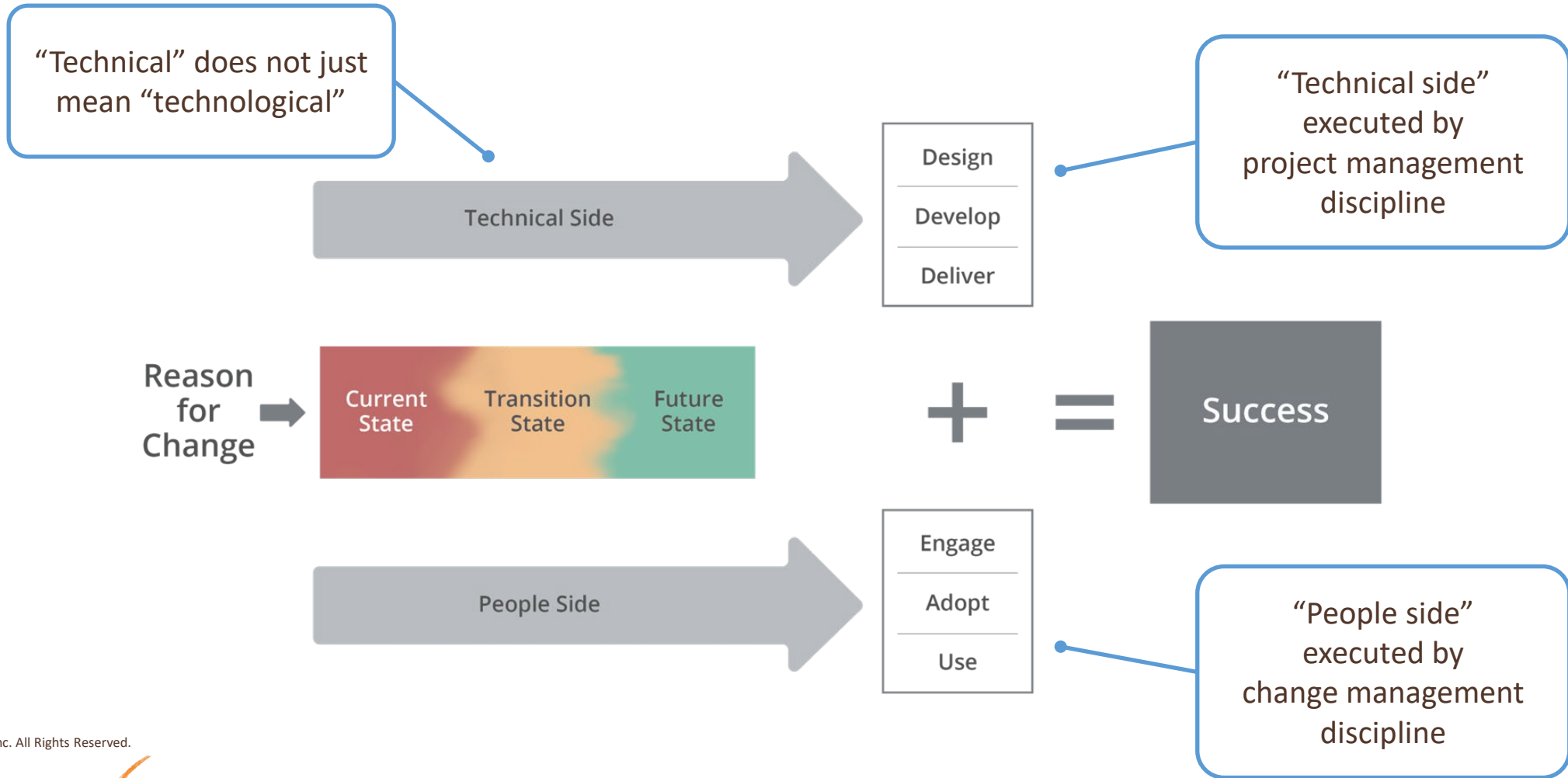
**for “go live”** on Wednesday

**Who has been involved in a change led this way?**





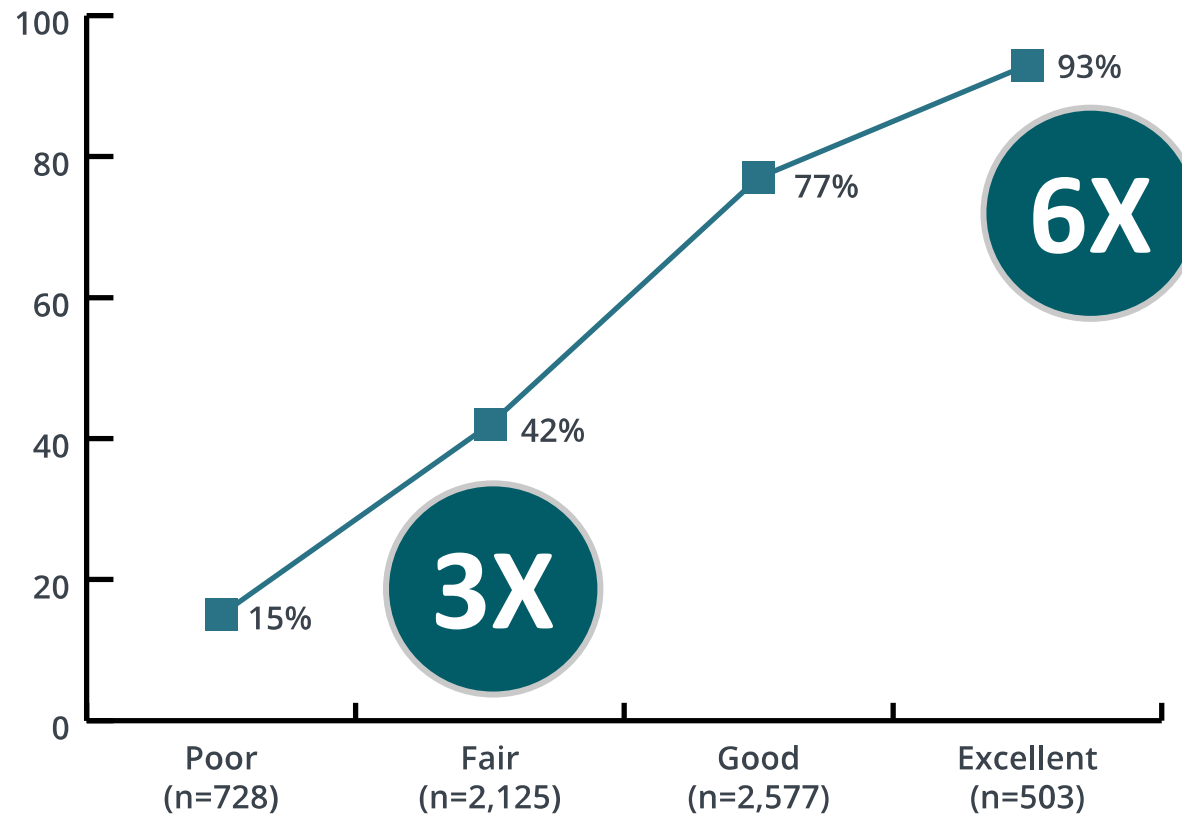
# Successful Change Requires Both Technical And People Sides



# Managing The People Side Of Change And Achieving Project Results

The ability to successfully deliver **project objectives** is directly impacted by how effectively we **manage the people side of change**

Percent of respondents that met or exceeded project objectives



Prosci 2020 Benchmarking Data from 2007, 2009, 2011, 2013, 2015, 2017, 2019



# 3 People-side Factors Determine Or Constrain Results



## Speed of Adoption

How **quickly** are people up and running on the new systems, processes, and job roles?



## Ultimate Utilization

How **many** employees (of the total population) are demonstrating “buy-in” and are using the new solution?



## Proficiency

How **well** are individuals performing compared to the level expected in the design of the change?

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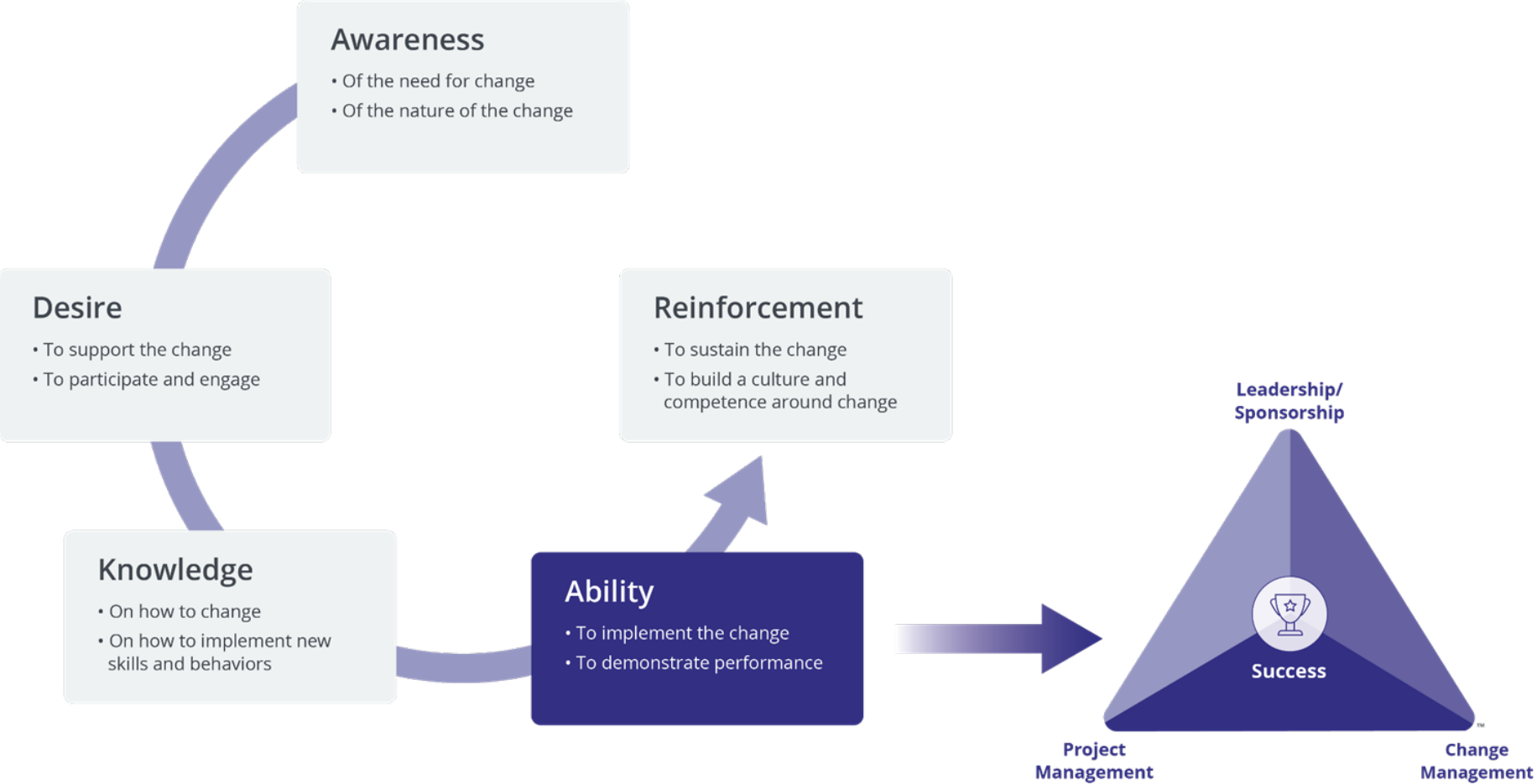


# ADKAR Model On A Page

ADKAR element	Definition	What you hear	Triggers for building
<b>A</b> Awareness	Of the need for change	“I understand why...”	Why? Why now? What if we don’t?
<b>D</b> Desire	To participate and support the change	“I have decided to...”	WIIFM Personal motivators Organizational motivators
<b>K</b> Knowledge	On how to change	“I know how to...”	Within context (after A&D) Need to know <i>during</i> Need to know <i>after</i>
<b>A</b> Ability	To implement required skills and behaviors	“I am able to...”	Size of the K-A gaps Barriers/capacity Practice/coaching
<b>R</b> Reinforcement	To sustain the change	“I will continue to...”	Mechanisms Measurements Sustainment



# Organizational Outcomes Are The Collective Result Of Individual Change



# Applying CM on an Implementation



# What Is Your Reason For Change?



Support Future Growth

We had outgrown and needed an ERP that could grow with us



Increase Data Integrity

We worked in multiple systems and spreadsheets and needed one source of truth



Improve Financial Visibility

We needed the ability to track dairy from farm to finished product



Reduce System Complexity

We had a highly customized system with many external systems that didn't talk to each other



# ERP Selection & CM By The Numbers

16

- Cross-functional ERP selection members
- 10 dedicated to ERP full time
- 6 dedicated to ERP part time

40

- Focus groups
- Based on business areas and ERP processes.
- Discussed pain points in current system

2200

- Requirements gathered
- Based on:
  - must have
  - nice to have
  - future

6

- RFPs sent to potential vendors
- 4 didn't meet requirements

2

- Shortlisted vendors
- Provided each vendor 2.5 days to present their solution



# #1 Tactic To Manage Resistance: Listen And Understand Objections

6. What is your biggest concern with replacing NAV? Again, please provide as much detail as possible.

Survey helped build  
Awareness and Desire by  
allowing the users to voice  
their concerns



[Show Responses ▶](#)



# Your Implementation Team Are Employees First



## Strengths Finder

- Identified and aligned our teams' collective strengths
- Allowed us to assign roles that played to strengths



## Identify SMEs

- Worked in small groups to identify SMEs
- Broke them down by ability:
  - SME
  - Trainer
  - Change Agent



## Identify Resistance

- Based potential areas of resistance on survey results
- Used small groups to identify additional potential resistance

# Building CM Plans Based On Employee Feedback

## Group Report Details

Group name	Number of employees
1) Sales	30
2) Customer Service	10
3) Supply Chain	100
4) Manufacturing	315
5) Quality	45
6) Finance	30
7) Information Technology	35
8) Human Resources	15
9) Research & Development/Category Management	20
10) Implementation Team	

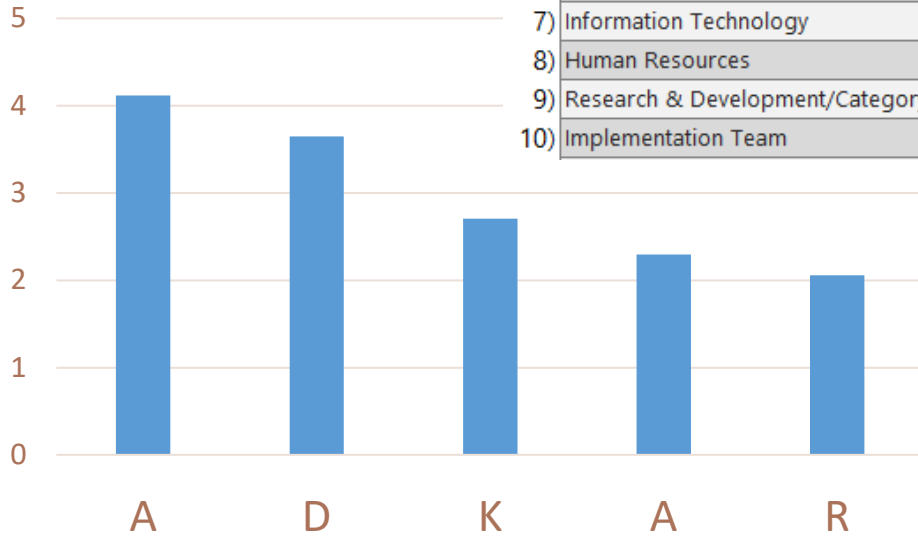
## Degree of Impact

Number of aspects (out of 10)
7
7
7
7
7
7
8
8
7
7
8

Degree of impact (avg)
1.7
2.3
2.7
1.7
2.1
3.2
2.8
1.2
1.7
3.8

## ADKAR Analyzer

	A	D	K	A	R	Barrier Point
5	5	5	2	2	1	Knowledge
5	5	4	2	2	1	Knowledge
5	5	5	2	2	1	Knowledge
5	5	5	2	2	1	Knowledge
5	4	2	2	2	1	Knowledge
5	5	3	3	3	1	Knowledge
5	4	4	4	3	1	Ability
4	2	2	2	2	1	Desire
4	3	2	2	2	1	Desire
5	5	4	3	3	1	Ability



# Communication Research Shows...

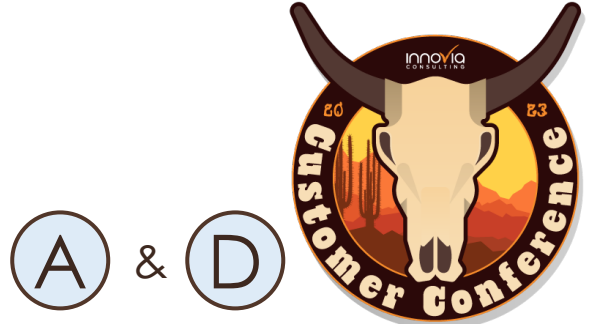
Face to Face  
communication is  
most effective

Middle Managers  
are often most  
resistant, yet  
critical to front-line  
awareness

Business messages –  
Sponsor  
Personal messages –  
Supervisor

# Who Communicates What... And How???

Timing	Message Content	Delivery Mechanism	Sender
Kick-off Early Stages	Indicate how critical involvement is and provide more information on what to expect (cascaded information and two-way feedback)	Site BBQ for managers Provide talking points and a timeline to hand out	Project team Site directors Sponsors
Monthly	Incremental updates and potential needs delivered by managers face to face at venues that involve their team's input <ul style="list-style-type: none"> <li>Talking points and materials provided by project team</li> </ul>	Email Staff meeting to mid-level managers and supervisors	Project manager
Quarterly	Project updates Support needed	Face to face State of the Site meeting	Site Ops Lead
As Needed	Special Tactics to address resistance	Face to face	Project Team Member



# Addressing The People Side Factors: Speed Of Adoption, Ultimate Utilization, Proficiency



# #2 Tactic To Manage Resistance: Focus On Outcomes

- Employee involvement and ownership naturally builds desire to support the change
- Regularly scheduled meetings with business groups to map current processes
- Invited users from all levels of the business so we had access to tribal knowledge all the way to the floor level

Solution Development

User Acceptance Testing

Training

# #5 Tactic To Manage Resistance: Create Hope

- Employees and SMEs were directly involved with the development of the solution
- As a team, we were able to discuss best practice and improve antiquated processes
- We were also able to validate business processes and used that information to define security roles

Process Mapping

User Acceptance Testing

Training



# #6 Tactic To Manage Resistance: Show The Benefits In A Real And Tangible Way

Process Mapping

Solution Development

Training

- Invited the SMEs to User Acceptance Testing (UAT)
- Used their input to determine if success criteria had been met
- Our partner was able to address concerns in real time to the end users

# Your Training Plan Drives User Ability To Engage And Adopt The Change

Process Mapping

Solution Development

User Acceptance Testing

- Training began with SMEs at User Acceptance testing
- Iterative and Repetitive
  - Weekly trainer-led labs
  - Tracked for each user
- Users signed off that they were trained and felt proficient in their roles

# Provide Reinforcement To Sustain The Change: The First 90 Days

Entire ERP  
Team Available  
at Go-Live

- Entire ERP team available on-site for the first 96 hours
- Ops team members always available for the first 2 weeks

War Room With  
24-hr Open  
Teams Call

- We kept an open Teams line for any issues
- Users could log onto the call at any time for help resolving problems in real time

Issues  
Resolution List  
by Priority

- Created an issues list and assigned priorities
- This list was available to view by all users for clarity and transparency

# Sponsorship Was On Point!

“I decided since I’m not technical, I can clean up after all of you that are.

- L.P., CFO

”

\*\*Comment made at 4am in the war room



# Any Questions?





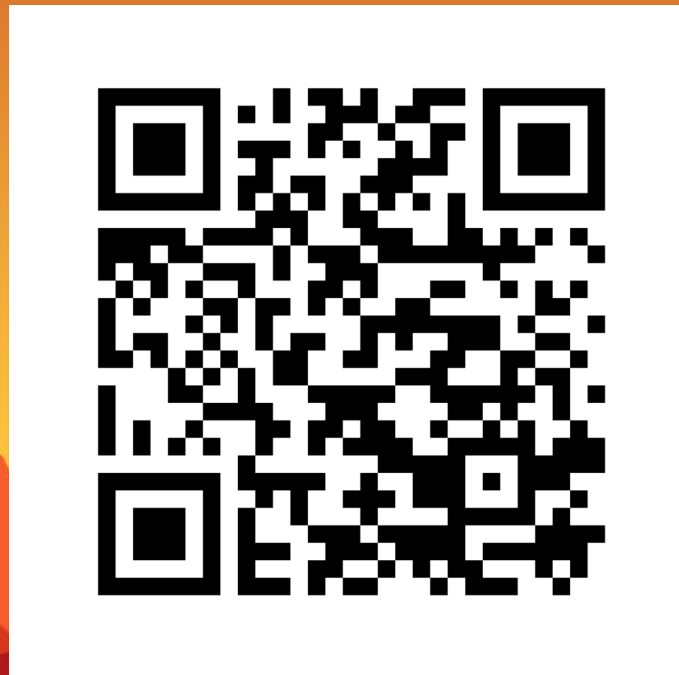
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# Thanks for Joining Us



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