

Agency Engagement Center Standard Tools List with Purpose and Benefits

OCM Areas	Categories	Tools	Purpose	Benefits	Version Date	Use
OCM Phase 1 Preparing for Change	Prosci Impact Index (Only available to Prosci certified practitioners. For more information on these templates review the "Prosci Tools used in Agency Engagement Center document")	4-P Exercise	This exercise is conducted with the OCM Lead and PM together to confirm they have the same understanding of the purpose of the projects and the specific changes people will need to make.	This documentation can be referred to at any time when we need to refresh our memory on the changes that need to be made by people impacted by the project.	1-Mar-17	Prosci Proprietary
		PCT Triangle	To identify risks in the areas of Sponsorship, Project Management, and Change Management.	The initial assessment becomes a baseline against which we can compare future risk assessments to see the progress we are making in managing risks.	1-Mar-17	Prosci Proprietary
		Org Attributes (Risk Grid)	To identify risks associated with organizational culture and past experiences with change.	By understanding culture and past experience, we can plan actions to match the particular risk profile.	1-Mar-17	Prosci Proprietary
		Change Characteristics (Risk Grid)	To identify the size and types of change impacts that the various stakeholders will experience.	Understanding the size and scope of change helps us build OCM plans that are appropriately sized to the needs of the stakeholders.	1-Mar-17	Prosci Proprietary
		Sponsor Assessments	To evaluate the sponsor from the viewpoint of prior experience in sponsorship and personal strengths and style.	The better we understand our sponsor, the more likely we are to develop a relationship that enhances the sponsor's style and preferences, which will lead to effective sponsorship.	1-Mar-17	Prosci Proprietary
		Group Impact Assessments	To examine and record the differences in the nature and size of impacts and readiness of different stakeholder groups.	OCM actions are not "one-size-fits-all" so the benefit of examining each stakeholder group separately is the understanding that will guide us in building the most effective plans for each.	1-Mar-17	Prosci Proprietary
	Readiness Assessment	Stakeholder Analysis Template	To document the level of impact, support and influence that each stakeholder group may have over the change initiative.	Reviewing levels of impact, influence, and support (or resistance) in one place helps you objectively determine appropriate amount of attention and support to give each group.	1-Mar-17	General Use
		Impact Gathering Template	To collect information about change impacts as you learn of them.	The benefit is having all known change impacts in one log that can be easily sorted and compiled by stakeholder group, type of impact and type of OCM activity that needs to be planned.	1-Mar-17	General Use
		Sample Readiness Survey Questions	Surveys are conducted throughout the project to measure how ready people are for the change.	Survey data tells us how ready people are for change, which helps us determine additional OCM actions to take to fully prepare them.	1-Mar-17	General Use
		Business Process Improvement Assessment			tbd	
	OCM Strategy	OCM Strategy Outline	To document high-level approach to OCM and each of its sub-components, with consideration to known risks and complexities.	The strategy document is used as input to the detailed implementation plans and is a reference resource throughout the life of the project.	1-Mar-17	General Use
		OCM Metrics Template	To guide you through the thought process of identifying metrics to measure the success of the project and the OCM work along the way.	Identification of metrics at the beginning of the project helps you stay focused on the leading indicators of success throughout the project. These metrics are inputs to an OCM scorecard.	1-Mar-17	General Use
		Resistance Management Worksheet	To think through and document the potential reasons that people might be resistant to the changes that are coming their way.	The benefit of identifying potential resistance early is that you have time to prevent or minimize the length and severity of the resistance.	1-Mar-17	General Use
		OCM Workplan Template	To plan OCM actions in alignment with the Agency Engagement Center (AEC) Toolkit.	The benefit of organizing the workplan to match the AEC toolkit is that the OCM actions will be likely to occur in a best practice sequence.	1-Mar-17	General Use
		OCM ARCI Matrix	To provide clarity around roles & responsibilities.	Avoids confusion over who does what. Minimizes risk of duplication and gaps in work production.	1-Mar-17	General Use
	Sponsor Roadmap	Sponsor Diagram Template	To show the relationships between the various sponsors and to show which sponsors are most supportive of the changes.	The codes show you where to focus your coaching efforts and help you communicate to your primary sponsor where you need support.	1-Mar-17	General Use
		Sponsor Roadmap	To plan sponsor actions that will keep the sponsor active and visible throughout the entire project lifecycle.	Prosci research shows that projects with highly effective sponsors are 6X more likely to achieve their business benefits as projects that do not.	1-Mar-17	General Use

OCM Phase 2 Managing Change	Resistance Management	Resistance Management Worksheet	This worksheet was originally developed during planning, and now it is used to document where and how the resistance occurs, and how it is being addressed.	The benefit of documenting where resistance occurs and how it is addressed, is that this becomes valuable lessons learned that can be shared across stakeholder groups.	duplicate - template found in Phase 1	General Use
		ADKAR Worksheet	To determine where individuals are on their personal journeys of preparing for and adopting change.	Managers benefit from knowing the barriers employees are facing as they prepare for change, so they can coach in their specific areas of need.	1-Mar-17	Prosci Proprietary
		ADKAR Progression Template	To track and record progress that stakeholder groups are making on their readiness journey.	ADKAR is a sequential journey, and this tool shows exactly where a group has barriers and the progress they are making. This serves as a guide to the types of OCM actions needed at specific points in time.	1-Mar-17	General Use
		Lessons Learned Template	To log lessons as they are learned.	Valuable lessons can be learned about how to mitigate future resistance as we dig into the underlying concerns of current resistance.	1-Mar-17	General Use
	Communication Plans	Communications Matrix -basic	To plan and track communications details, such as audience, channel, sender, date, etc.	Communications activities occur all throughout the lifecycle of a change initiative, and this matrix becomes the historical record over time.	1-Mar-17	General Use
		Communication Drafting Template	To keep important elements of the message right in front of you as you draft your message. (1.e. objective, recipients, etc.)	The draft is easily shared with others who need to review and approve. The completed form can be sent via email to others.	1-Mar-17	General Use
	Training Needs Analysis	Training Needs Analysis Template	To record gaps in knowledge, skills, or abilities, that will need to be addressed via training.	This matrix provides a comprehensive list of training needs that becomes input to the training development plan and the training delivery plan.	1-Mar-17	General Use
	Training Development & Deployment	Training Development Plan Template			In Development	
		Training Delivery Schedule Template			In Development	
	OCM Phase 3 Reinforcing Change	Pre Go-Live Readiness Review	OCM Metrics Template	The purpose of updating this template is to see which areas of performance need reinforcement. As targets are achieved, success s/b celebrated. Where gaps exist, targets should be kept alive.	Measuring and recording progress throughout execution provides a very clear picture of whether stakeholders are ready to go live, and if they are not, what the remaining gap is.	duplicate - template found in Phase 1
ADKAR Progression Template			To continue to track progress that stakeholder groups make on their readiness journey.	ADKAR is a sequential journey, and this tool can show whether stakeholder groups have progressed sufficiently for a successful go-live.	duplicate - template found in Phase 2	General Use
OCM Go-Live Checklist			To ensure you ask the right questions shortly before go-live to know whether you have adequately prepared people.	Its best to create this list shortly after the OCM workplan is ready and milestones are known. The benefit is can be monitored all through execution.	1-Mar-17	General Use
Post Go-Live Utilization Review		OCM Metrics Template	The purpose of updating this template is to see which areas of performance need reinforcement. As targets are achieved, success s/b celebrated. Where gaps exist, targets should be kept alive.	Measuring and recording progress after go-live helps leaders know what to reinforce so that new behaviors become the new way of doing things.	duplicate - template found in Phase 1	General Use
		Post Implementation Scorecard	To continue to measure and track business results until they are achieved.	Operations can see exactly where they still have gaps between current metrics and the expected business results of the project.	1-Mar-17	General Use
Sustainment/Operational Plans		OCM Metrics Template	The purpose of updating this template is to see which areas of performance need reinforcement. As targets are achieved, success s/b celebrated. Where gaps exist, targets should be kept alive.	Measuring and recording progress after go-live provides a clear picture of whether people are progressing as expected, and if they are not, what the remaining gap is.	duplicate - template found in Phase 1	General Use
		Lessons Learned Template	To continue to collect lessons learned for the benefit of future phases or additional stakeholder groups who are preparing for go-live.	Future stakeholder groups impacted by future rollouts can incorporate the learnings of the groups that went before them.	duplicate - template found in Phase 2	General Use
		Post Implementation Scorecard	To continue to measure and track business results until they are achieved.	Operations can see exactly where they still have gaps between current metrics and the expected business results of the project.	duplicate - template used earlier in Phase 3	General Use
		Post Implementation Satisfaction Survey	To assess how well people are adopting to the change and the new ways of doing things.	Managers can see areas for celebration and recognition, as well as areas that may need additional reinforcement.	1-Mar-17	General Use

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For OCM guidance or assistance with standard tools, please contact the Agency Engagement Center at OAKSengagement@das.ohio.gov. We are happy to help!