ITPMG

Helping Companies Improve Their Performance…..
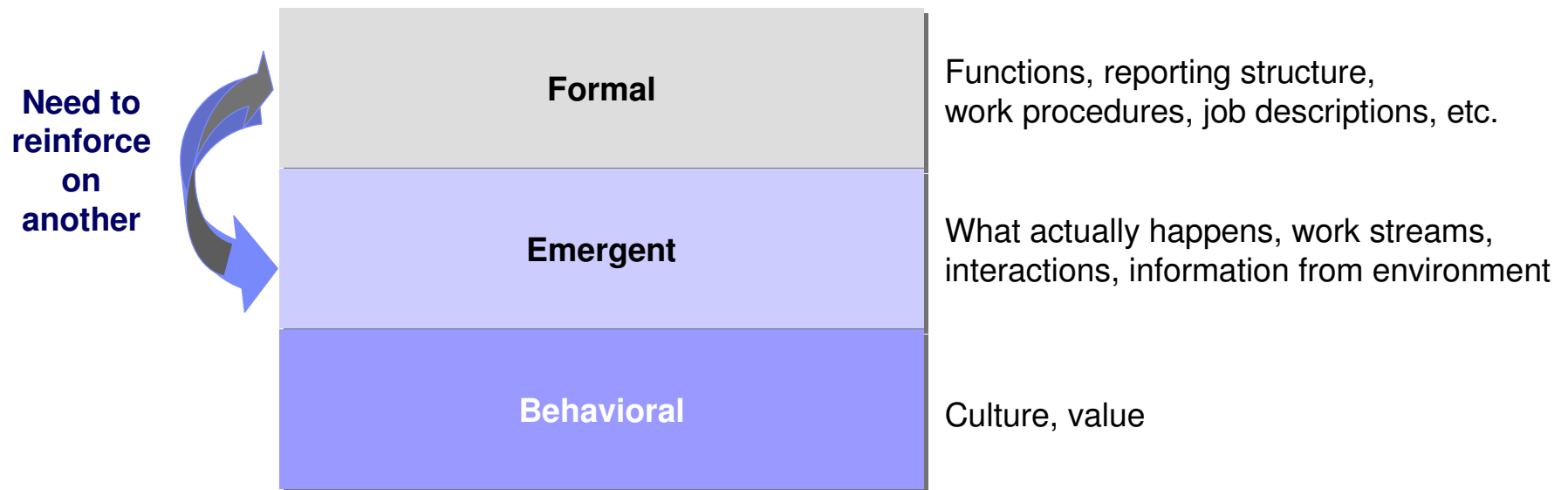
Project Deployment Considerations
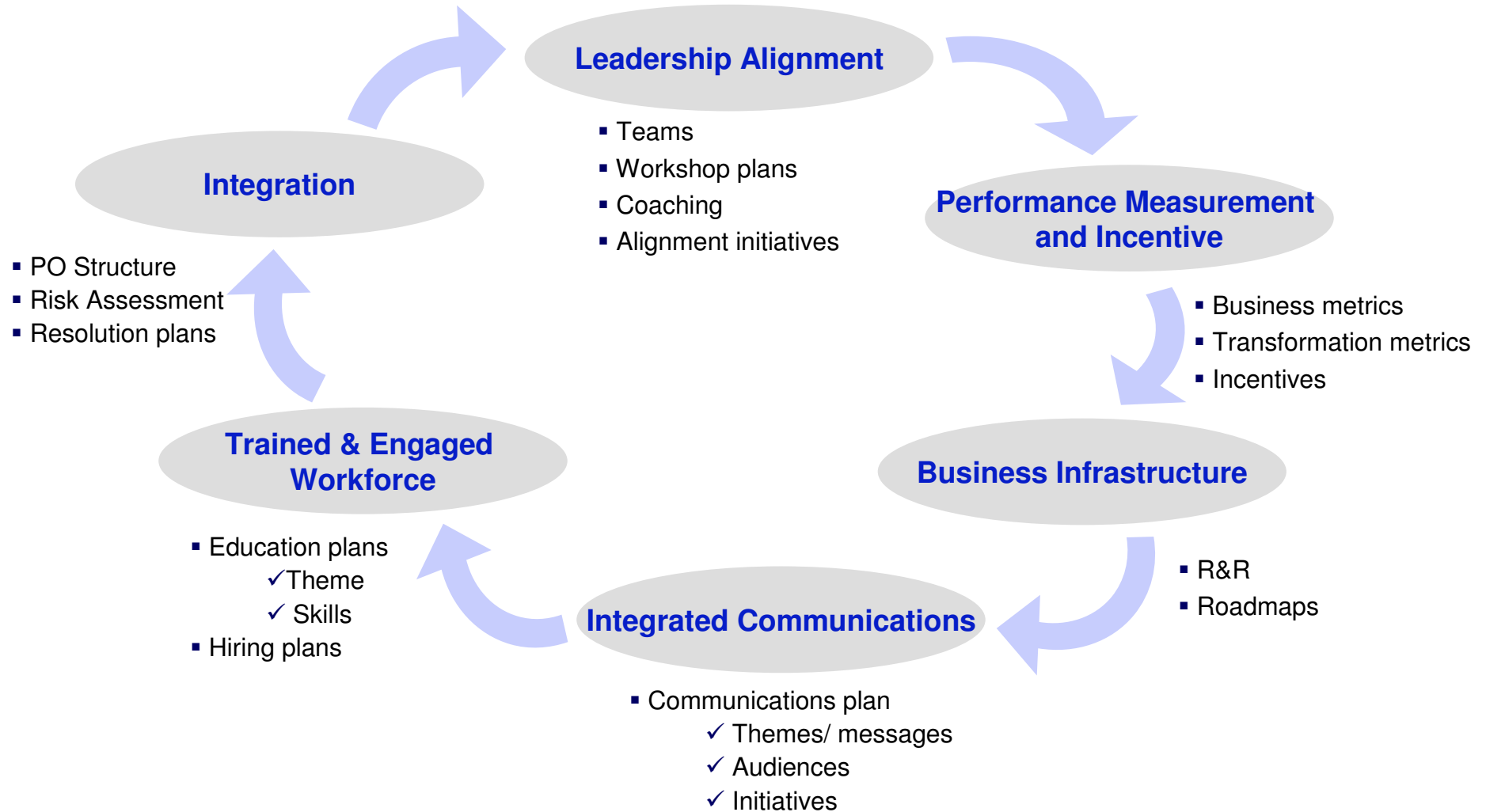
June 2007

Organizational Layers

Need to reinforce on another

Formal	Functions, reporting structure, work procedures, job descriptions, etc.
Emergent	What actually happens, work streams, interactions, information from environment
Behavioral	Culture, value

Business Transformation Wheel

Leadership Alignment

- Teams
- Workshop plans
- Coaching
- Alignment initiatives

Performance Measurement and Incentive

- Business metrics
- Transformation metrics
- Incentives

Integration

- PO Structure
- Risk Assessment
- Resolution plans

Business Infrastructure

- R&R
- Roadmaps

Trained & Engaged Workforce

- Education plans
  - ✓ Theme
  - ✓ Skills
- Hiring plans

Integrated Communications
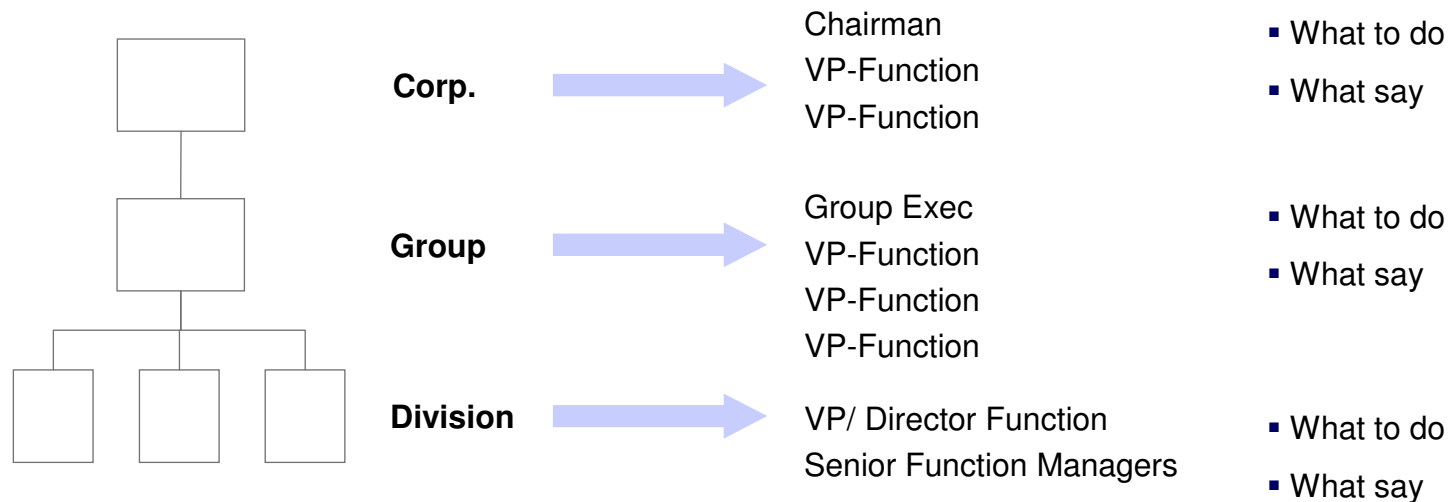
- Communications plan
  - ✓ Themes/ messages
  - ✓ Audiences
  - ✓ Initiatives

Deployment Considerations

*Ongoing visible senior management commitment is needed in **WORD** and **DEED** for at least the top three leadership layers in the organization*
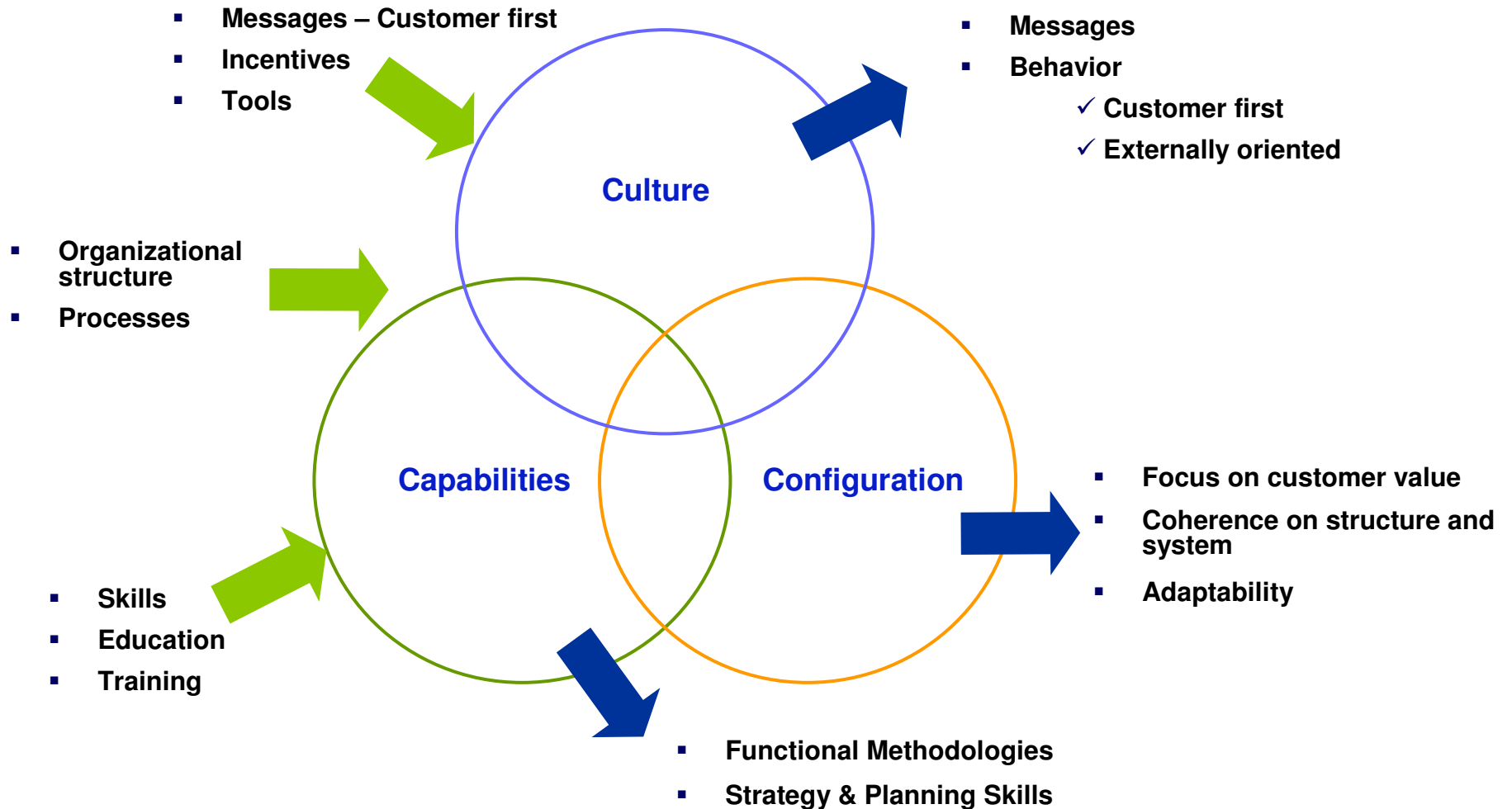
Corp.	→	Chairman VP-Function VP-Function	▪ What to do ▪ What say
Group	→	Group Exec VP-Function VP-Function VP-Function	▪ What to do ▪ What say
Division	→	VP/ Director Function Senior Function Managers	▪ What to do ▪ What say

Input from the three levels

- Process steps/ deliverables

- Function professional framework/ specifics

- Management system

Key Levers to Change

- *Sponsor team/ deployment teams* are the PULL for expected behavior change
  - They are also the support

- *Measurements and targets* are the PUSH for expected behavior change
  - Measurements and targets are the creative tension for 'reach' targets

- *Incentives* are the PULL that reward the desired behavior change
  - Reward system drives individuals and teams to accomplish objectives

- *Executive communication* is the PUSH for the behavior change
  - Continuous messages to reinforce the importance of behavior change

Change Elements

Messages – Customer first
- Incentives
- Tools

Messages
- Behavior
  - ✓ Customer first
  - ✓ Externally oriented

Culture

- Organizational structure
- Processes

Capabilities

Configuration

- Focus on customer value
- Coherence on structure and system
- Adaptability

- Skills
- Education
- Training

- Functional Methodologies
- Strategy & Planning Skills

Foundation Elements – Three Pillars

The Pillars	The Benefit

- **Sustained core message**

  Theme
  - Compelling statement (vision)
  - Short, memorable
  - Consistent with external corporate image

- **Creates efficiency** as an umbrella for other communication tasks

- **Continuous User Feedback**
  - Surveys
  - Focus groups

- **Increases rate of acceptance** from buy-in and adjustment

- **Ongoing Impact Assessment**
  - Quantitative and Qualitative model
  - Activity based levers

- **Resource allocation** and program development guide

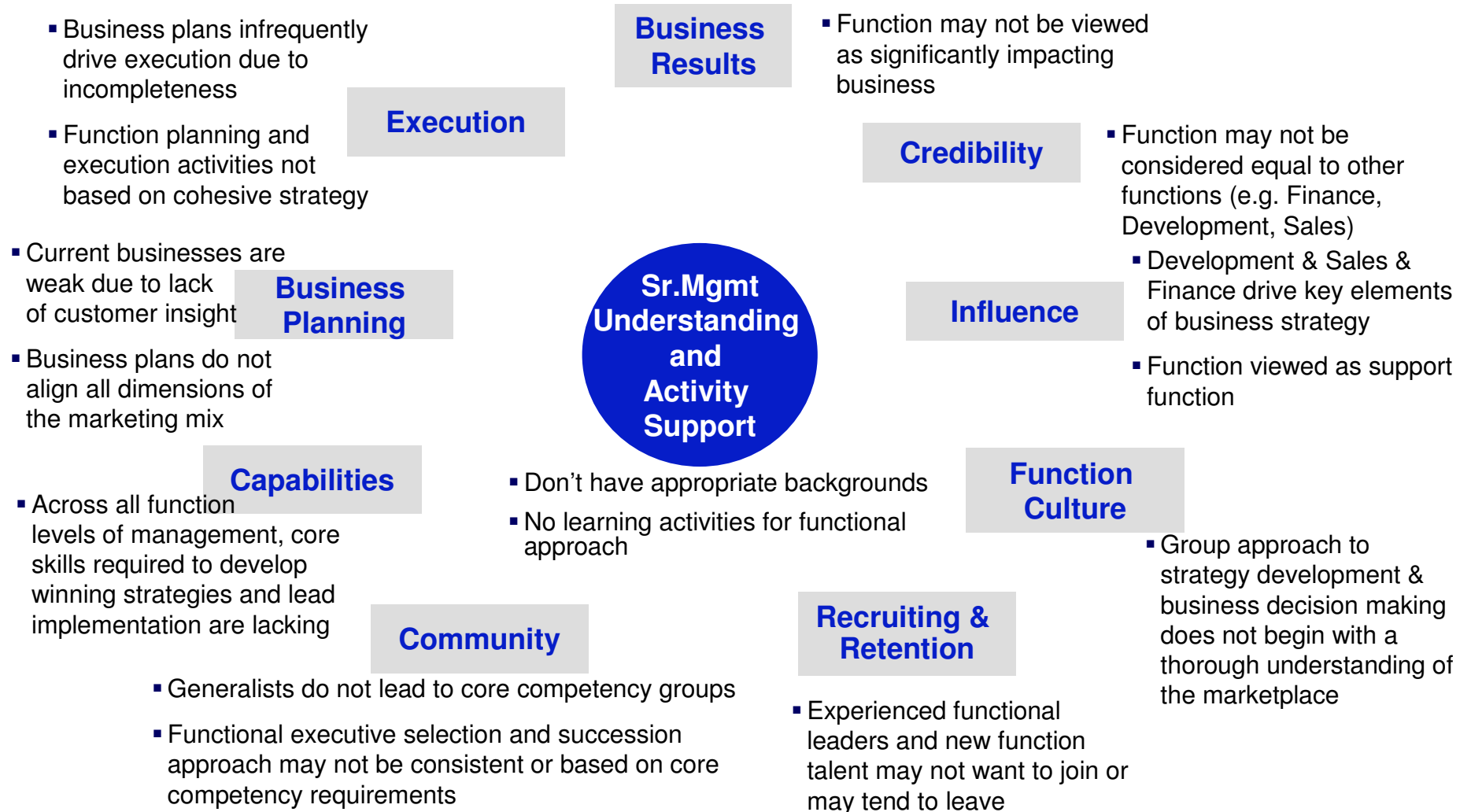# Deployment Activity Considerations

Left Brain Activities

- Events

- Performances

- Prizes

- Herd worship

- Group confessional

- Music/ videos

- Advertising

Vs.

Right Brain Activities

- Case studies

- User surveys

- Performance tracking

- Value proposition

- Slide decks

- Collateral material

- Executive presentation – " the pitch"

The Organization Function Dependency Cycle

- Business plans infrequently drive execution due to incompleteness

- Function planning and execution activities not based on cohesive strategy

Execution

Business Results

- Function may not be viewed as significantly impacting business

Credibility

- Function may not be considered equal to other functions (e.g. Finance, Development, Sales)

- Current businesses are weak due to lack of customer insight

Business Planning

- Business plans do not align all dimensions of the marketing mix

Sr.Mgmt Understanding and Activity Support

Influence

- Development & Sales & Finance drive key elements of business strategy

- Function viewed as support function

Capabilities

- Across all function levels of management, core skills required to develop winning strategies and lead implementation are lacking

- Don't have appropriate backgrounds

- No learning activities for functional approach

Function Culture

Community

- Generalists do not lead to core competency groups

- Functional executive selection and succession approach may not be consistent or based on core competency requirements

Recruiting & Retention

- Experienced functional leaders and new function talent may not want to join or may tend to leave

- Group approach to strategy development & business decision making does not begin with a thorough understanding of the marketplace

Deployment Stage Objectives

- Secure commitment to stage results & theme
  - Senior sponsor/s
  - Sponsor team
- Define vision of desired end state
- Identify critical obstacles, potential incentives, key champions and measurable objectives
- Segment/ establish target and prioritize activities
- Develop deployment theme
- Establish overall approach strategy
  - Mix of people
  - Program, etc.

Deployment Stage Objectives (continued)

- Create detailed deployment launch plan
  - Timetable
  - Resources
  - Roles/ responsibilities
- Gain agreement of senior sponsor/s and sponsor team
- Deploy
- Adjust if required during deployment
- Adjust during implementation

Team Composition

Two important teams/ groups to form and manage:

Sponsor team (Global)	Deployment Team (Project team)

Sponsor team (Global)

- Senior management leader
- Steering committee
- Business unit sponsors
  - ✓ Functional VP
  - ✓ Senior staff
- Corp. initiative liaison
- Geographic advisory group
- Other
  - ✓ Site reporters to identify success and issues throughout organization (understand all members' needs/ wants/ motivations)

Deployment Team (Project team)

- Overall project management for oversight and consistency
- Subject and process matter experts
- Program managers for discrete elements e.g.
  - ✓ Events, communication vehicles
- Training/ Facilitation
- Communications architects
  - ✓ Collateral, media
  - ✓ Workshops
  - ✓ Events
- Data collection and analysis
- Technology infrastructure
  - ✓ Collaborative communications tools
- Management system

Deployment Considerations/ Questions

- Do all function professionals understand their current role, responsibility and process used?

- Do we understand the impact of change within the function?

- Is there agreement on current role of the function in the organization?

- What are the expectations of other functions (Development, Finance, Sales, Marketing and IT) as a result of change?
  - Stakeholders

- Is there any business process that could impact deployment?
  - Budget process
  - End of year close
  - Major product launch cycle

Deployment Considerations/ Questions (continued)

- Is there a consistent level of awareness across all corp. and division executives on what the initiative is and what the deployment team is doing?
  - Is this everything in the initiative?
  - If not, what else is there?
    - Initial stage/ more to come
- Will the deployment team and sponsor team remain constant?
  - Turnover/ lack of retention will impact deployment
- Do the 'soon-to-be' functional managers have the necessary skills to perform/ lead during the transition?
  - Poor skills do not engender trust in new managers to take leadership role
- Does the management system support the elevation of function to a leadership role if required?

Deployment Cycle

Similar to the market life cycle – deployment will continually need to focus on inhibitors that impede progress

Early Majority
or
"Pragmatists"

Late Majority
or
"Conservatives"

The Chasm

Early Adopters
or
"Visionaries"

Innovators
or
"Techies"

Laggards
or
"Skeptics"

Introduction	Growth	Adoption	Maturity	Decline
5%	10%	30%	30%	20%
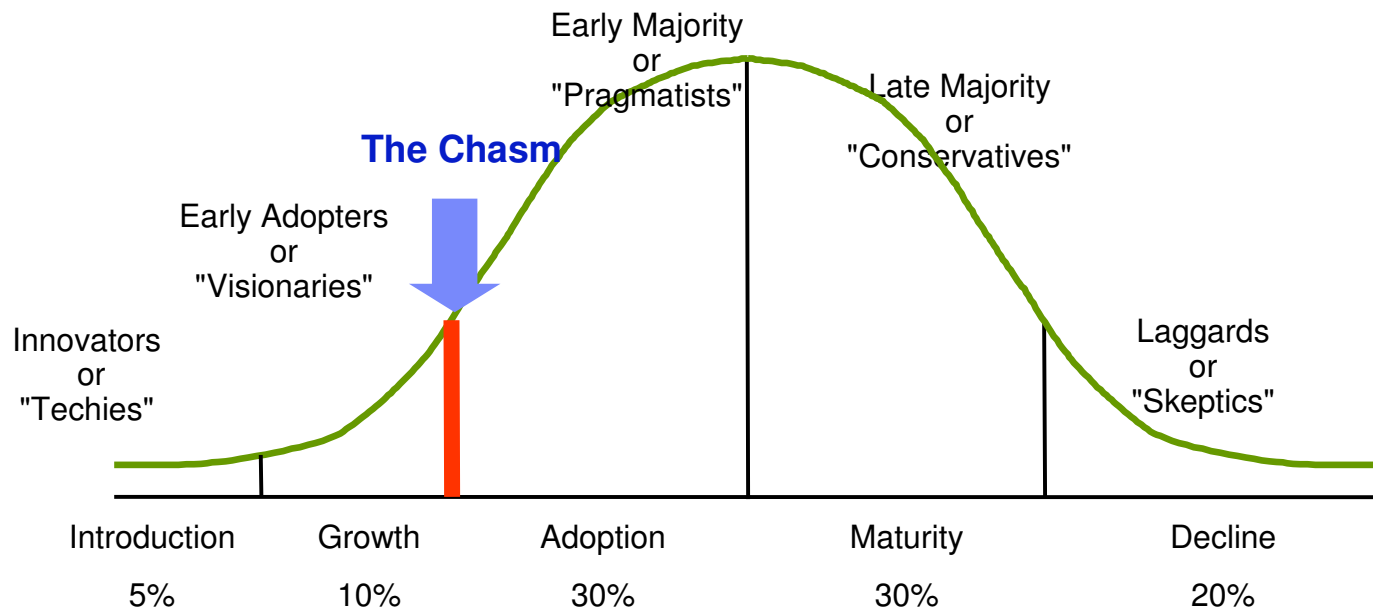
Always be aware that a chasm may happen and prepare for it.

Understand and plan for disruptive technologies (people, process, etc.)

Deployment Activities/ Actions

- Review detailed results of all stages and gain agreement on results, implications and next steps as well as theme
  - Deployment team (current)
    - All work streams and related teams
  - Sponsor team (current)
    - Corp./ Division
- Communicate results of reviews to all appropriate Corp./Division staffs
  - Finance, development, sales

Deployment Activities/ Actions (continued)

- Expand deployment team and sponsor team as required
  - Deployment team
    - Key division executives/ senior managers
      - Responsible leaders (RL's) for marketing, development, finance, and sales
      - RL's will provide input for final adjustments and be responsible for deployment in their functions
  - Sponsor team
    - Key Corp./division executives who will impact/ be impacted by change (Finance/ Development/ Sales/ Marketing/IT)
      - They should provide input and agreement on final adjustments
    - Be responsible to provide executive leadership and communicate importance of change

Deployment Activities/ Actions (continued)

- Adjust and finalize the work stream deliverables and implications (deployment short team/ work streams)
  - Process
    - Sub processes
    - Deliverables
    - Linkages
  - Professional Career
    - Framework
    - Disciplines
    - Linkages: process, other departments/ functions
  - Implications
    - Organizations
    - Other processes
    - Financial

Deployment Activities/ Actions (continued)

- Review final plans/ deliverables, etc. with expanded deployment teams
- Review final plans/ deliverables, etc. with sponsor team for agreement (and note updates/ changes. If none, it will be an update/ status meeting)
  - Short team first
  - Expanded team second
- Communicate results of final agreements to Corp. and Division with roll-out plan
  - Key/ all executive meeting
  - Letter to employees from Corp./ Division
  - Intranet letter
  - Key senior manager meeting
    - All functions
      - Mixed/ non-mixed

Deployment Activities/ Actions (continued)

- Once communication is done,
    - Require key departments and division to develop a deployment plan about initiative with measured milestones that they track and report monthly on to the sponsor team and employees

Deployment Governance

(Business rules and principles of operation)

Sponsor Team A

- Chairman
- Direct reports

Sponsor Team B

- Corp. executives
- Group/ Division executives
- Provide insights
- Ultimate decision/ arbiter

Deployment Team

- Small group/ team
  - ✓ Collect/ analyze/ recommend/ lead & provide assistance
  - ✓ Decision-maker for deployment team
  - ✓ Create communication vehicle content
  - ✓ Ongoing impact/ assessment reports
- Expanded team
  - ✓ Provide input/ deploy in units/ provide input/ report on deployments results/ continuous input

Sponsor Team ← *Recommendations* → Deployment

Agreement
Leadership
Roadblock removal
Enablement
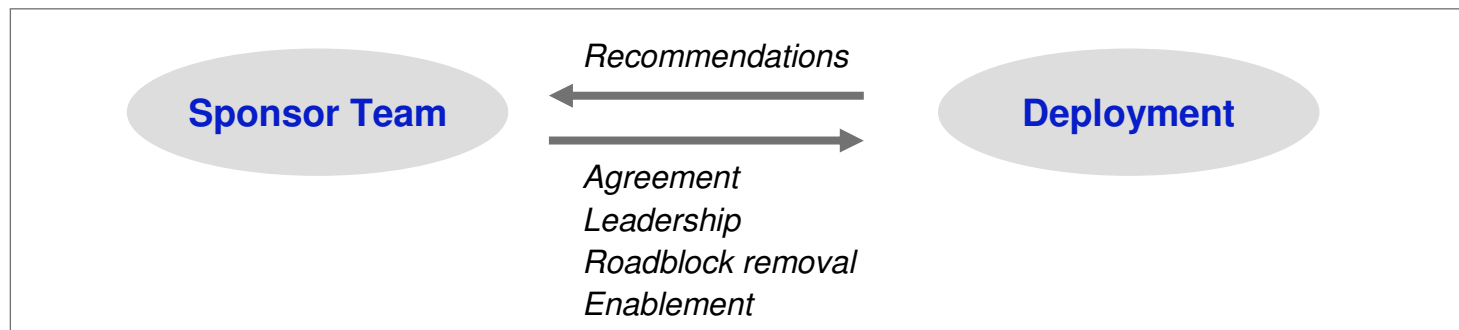
Deployment Activities/ Actions (continued)

- Set up education and training schedule for all execs on initiative and contents
  - Theme/initiative
  - Process
  - Professional career framework
- Evaluate need for more detailed executive education on functional activities
  - One on one
  - Group
  - Combination of both
- Begin implementation
  - Assistance to departments during implementation to come from deployment team
    - Process
    - Professional framework
  - Assistance from other Corp./ division functions as required
    - e.g. HR

Deployment Activities/ Actions (continued)

- Set up education and training on
  - Activities within process for all employees
    - Phase in: selected impact employees first
      - Group
      - One to one
      - Combination
      - Coaching
      - Mentoring
  - Prioritized skill gaps
    - Prioritization based on skill gap data and executive input
- Develop prioritized education/ skill development modules ASAP and deploy

Communications Program Considerations

- Position initiative as a value creating platform, e.g.
  - Program linkage to overarching company/ division goals
  - Business unit vehicle for identifying growth opportunities
  - Coordination mechanism to increase organizational efficiency
  - Vehicle for making division/ company market driven
- Integrate deployment message with other corp./ division messages/ themes
  - Consistent with external messages about company
  - May use existing ad copy approach? – lots of color
- Recognize differences of internal marketplace
  - Politics
  - Maturity index by function

Communications Program Considerations (continued)

- Develop multiple communication models e.g.
  - Promote – events, periodic updates, central repository tools
  - Solicit – surveys, assessments
  - Collaborate – workshops, training
- Coordinate and utilize a wide variety of media, e.g.
  - Large gatherings and small meetings
  - On-line collaborative sessions
  - Newsletters
  - Videos
  - Videoconferencing, conference call

Odds' ends

- Have you documented executive commitments/ interviews?
- Results ↑ (Specific to execs)
- Initiative performance metrics
  - Balanced scorecard - Yes
  - Deployment/ implementation – No
- Transformation Roadmap

Deployment Process

Work stream teams

Extended Teams

Key Stakeholder

Deployment Meetings

Prepare documentation

Review

Review & Approval

Adjust

Adjust

Adjust
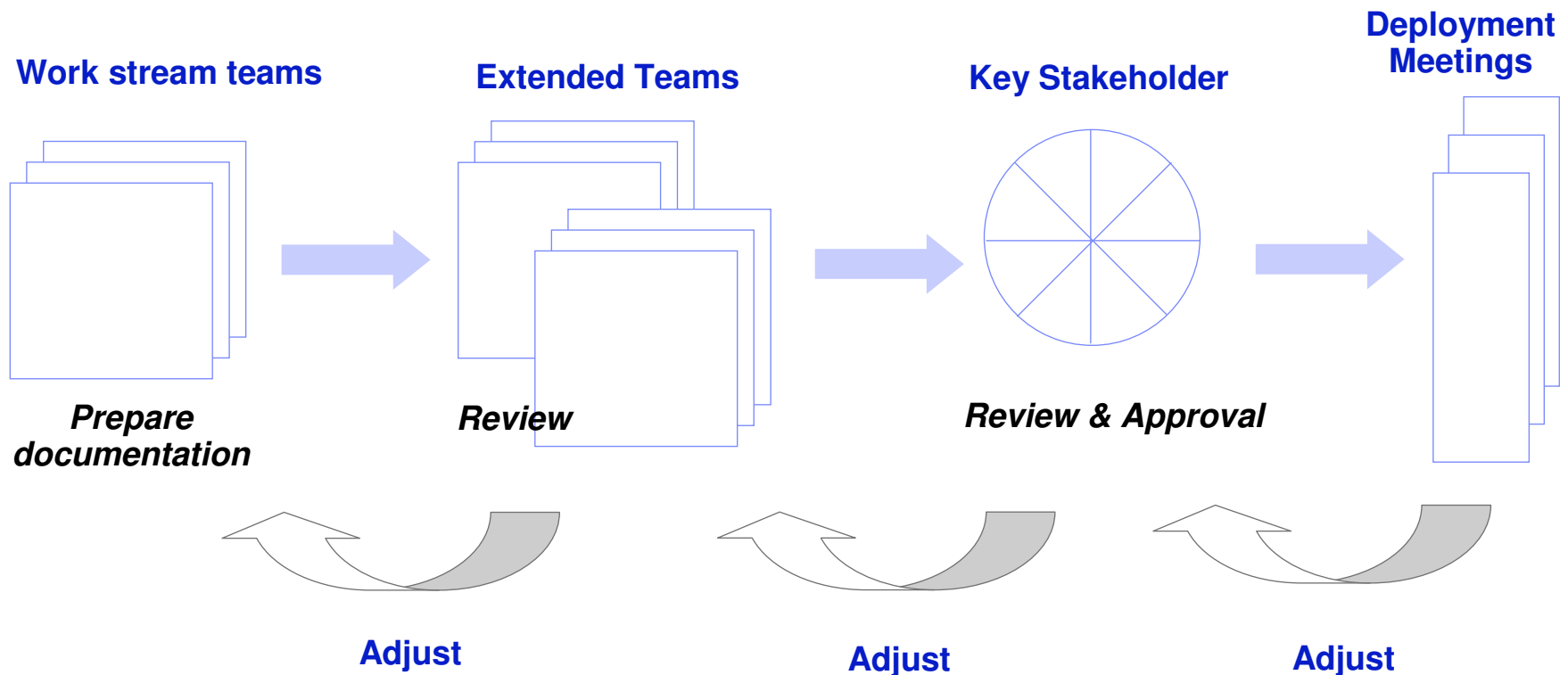
Same for Phase 1 & 2

Capabilities

- Skill Set Improvement Through a Professional Career
- Functional Process Improvement

Skill Set Improvement Through a Professional Career – Rationale/ Thoughts

- Standardized the functional jobs to enable globalization of the function
  - Skill sets and descriptions the same worldwide
    - The thought being that if we standardized we would increase our talent pool
    - Standardization also let the employee know that no one country had an advantage over another for career opportunity
- Functional skill set told employee what skills needed to do job
- Career announcement handled like a product announcement
  - Brochures, web-cast, etc.
  - The thought being that the company should want the focus functional community to feel good about the 'validation' of the function
  - You should also want the rest of the company to know that you have 'formalized' the focus function

Skill Set Improvement Through a Professional Career (continued)

- Constant in the thought process is that you should not want the employees to feel threatened with the professional career announcement due to the fact that they didn't have the required skills
  - Announcement messages specially stated that this was an opportunity that there would be training
- Identify the top people in each discipline in each division
  - Got them involved early in spreading the world
  - Gave them additional training on the professional structure
    - The thought being that word of mouth from peers would speed up adoption of the career and create role models

Skill Set Improvement Through a Professional Career (continued)

- Identify top professionals that would benefit most from some in-depth training in functional methods and techniques
  - Training should first be targeted at perceived skill gaps as determined by the corp. functional executive team and the core team
    - The thought is that you may need to get traction and to do that you should start with those that had the most potential
- Give the functional VP's six months to code/place all functional employees into the proper functional job codes
  - Track all activities by division, by discipline
  - Report results monthly to senior VP of the function
    - The thought is that you need to ensure the coding is done so that you can begin tracking
      - A) Headcount
      - B) Skill levels

Functional Process Improvement

- Kept the process very simple
  - Minimize steps/ minimize levels
  - Keep the process simple to gain adoption since there may be no formal processes in place

- Process should not go below level three
  - The thought is that you may not want to make it prescriptive. You should focus on *What* not *How* because if you focus on *How* you may limit the thinking and hinder adoption. Give the divisions *Flexibility* on the *How* with some guidance and frameworks
  - In most cases there is already some unofficial processes in place and you don't want to throw it away

Functional Process Improvement (continued)

- Recognized that is was going to be resistance to change and to use something new
  - Process/ Tool
  - Give presentations to all levels in the divisions/functions
    - Executives
    - Professionals
  - Make monthly calls on targeted executives to discuss progress of deployment
  - Identify 'key' professionals in the divisions and made the 'deployment team' leaders
  - Measure deployment annually and report results to senior Function VP and to the corp. process team
    - Deployment metrics
  - Compensation of functional executives should contain an element for process deployment

To receive additional materials on
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