

Step 5: Celebrate!



- Document achievements
- Document lessons learned
- Recognize accomplishments
- Publicize positive outcomes
- Continuously improve

DOCUMENT ACHIEVEMENTS

Document Achievements

- Take time to reflect on the experience and make an honest assessment of how it went
- Ongoing, continuous improvement of change management ultimately leads to better results
- Engage the entire team to get broad input and perspective

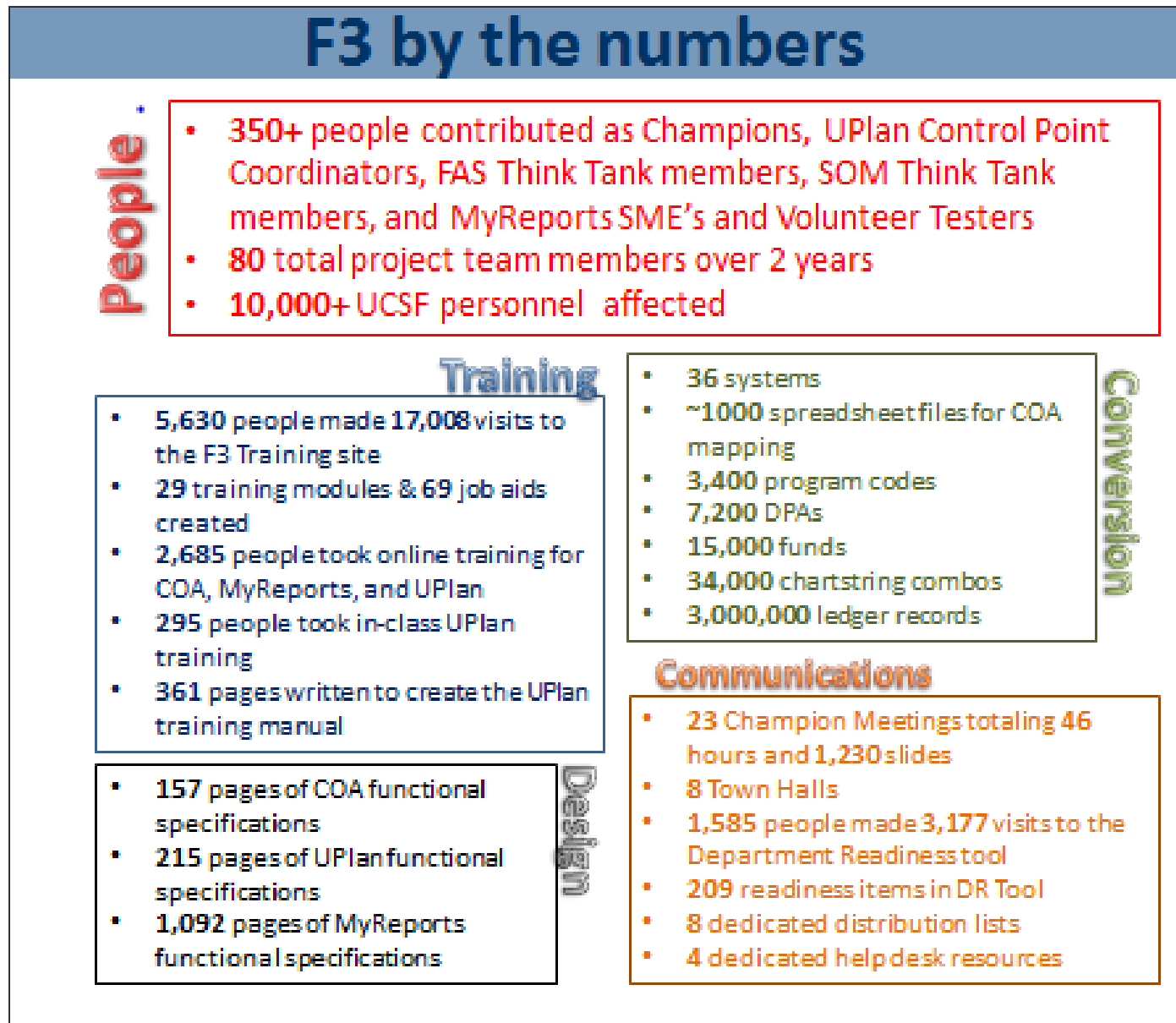


Achievements Examples

- Ways in which you met your original goals
- List of requirements from customers that were met
- Summary of key results that you tracked and measured in the Implement phase
- Survey of stakeholders



Achievements Sample



DOCUMENT LESSONS LEARNED

Document lessons learned

- Avoid blame – this exercise is intended for learning to prevent errors and improve future outcomes
- Be transparent – share your outcomes with those who can learn from them

Lessons Learned Activity

- What worked well?
- Challenges – what could be improved?
- Get specific by mentioning key areas

Examples:

- | | |
|----------------|-------------------|
| – Tools | – Data collection |
| – Participants | – Implementation |
| – Approach | – Communication |
| – Team dynamic | – User support |

Lessons Learned Samples

UPlan Team Debrief Results April 2014

Worked	Challenges; could be improved
<ul style="list-style-type: none"> • Focused SME group on specific topics. Helpful to team although would have been better with better attendance. • Engaging the Control Point Coordinators group in pre-launch activities helped push the responsibility for launch on to them – They took on coordination role • Scoping exercise helped us weigh the major options against each other; defining them was huge but important • Writing requirements document helped break up into components and improved management • Project Team owned much of change management – took responsibility for training using CMT for supplemental and support • Training: Hiring an outside consultant who could focus exclusively on training, freeing team for testing activities • Training: big bang approach got it out of the way, allowing for more focused efforts later. • Glad we all had to do the training/ learned. Get team out there with users. Same is true for lab support. 1:1 with planners helped. • User communication very useful and important. • The team was great, worked well with lots of gray areas. Assembling the team was ongoing; it changed and morphed as need arose • Specific resource needs identified early and often – whenever we needed help, identified and got it fast • Functional team very responsive to Tech Team; Decisions made pretty quickly. Got a lot of support from Mike, Dan, Yen, Erika; patient with “stupid” questions from tech team. • Team Attitude and Commitment: All doing best we can – get it right – give benefit of the doubt. Willing to change if needed, even if in requirements. Lots of nuance that were not understood in the beginning • Maintaining an issues list was helpful. • Tech team didn't start something without written requirements. 	<ul style="list-style-type: none"> • Aligning the resources – very small team for such a huge project. • Infrastructure team wasn't ready to take on responsibility and support so developers were needed to help them • Coordinating our implementation timeline with other projects, esp. given downstream of COA. Especially affected: <ul style="list-style-type: none"> ◦ Design: nothing was certain ◦ Testing: In hindsight tried to get our 2 testing cycles in, but they were driving conversion logic. 2nd test cycle way too short but only option given the calendar. Too much of our testing was really about COA conversion ◦ Build – huge difficult impact on HPP plan • Didn't test with every big issue. • Could have brought in external consultant beyond UCSF and m2 to review design. But also know it's hard to compare given uniqueness. And it was difficult to accept advice of consultants we had who encouraged us to keep it simple. Additional consultants may not have helped. • Need to manage post implementation expectations; 1:1 help created user expectations that we are there for them all the time • Didn't start with end results – reporting came after the design. • Department involvement was challenging – many didn't show up at SME input • Lots of storming around project tools – too often tried to find the perfect at the expense of the good – Many types of presentations were necessary • On campus peer review would have been helpful – more of it. • Consultation structure – FAS, SOM, SME and lack of ownership on that side. Struggled with lack of department/school advocates/partners during the design phase. • Even though we had everything in place, need to remember to test every time something big is done • Need UAT to sign off on functionality. Could have helped us catch some issues e.g. NIH, FF integration and may have made different decisions

Post Mortem Finance^a Change Management Team

Tools

- Wish we could have had an opportunity for users to play in environment for more beforehand – was not possible (was not complete)
- Using Captivate tool was robust, interactive, & allowed for great simulations, especially given that there were no actual environments to play in
- Training Self-Select Tool
- F3 Readiness Tool
- Use of the LMS Tool familiar/accessible to campus audience
- LMS was not the ideal tool for robust training roll out, though it was the best one available to the audience/distribution needs we had
- Use of UCSF Box
- Templates for Modules & Job Aids
- Numbering convention for Job Aids – give ourselves room for adding topics within the same topic area later
- Development of Games
- Post-GoLive Support Labs
- Support Labs started a little too early
- Town Halls & Champions Meetings logistics & publicity
- Promotional Items: Chartfield Charls, Chartfield Post-Its, etc.
- Post-GoLive Q&A Webinars having short, scheduled topics to start the conversation
- Consistent & clear storage of source documents, locations, etc. from the start

Staff

- Hiring resources
- Resources – could really have used one more developer
- Hooman was not an ideal consultant to work with, & we would not hire him again
- Having one member of each team on each project team
- Definition of roles within the training team
- Getting more team members trained on Captivate from start to avoid bottlenecks
- Ownership of tools by individual people (DR Tool, Training Website, etc.)
- Clear individual roles & follow-through, all very willing to pitch in & be flexible
- Weekly check-in meetings and weekly update meetings, with upbeat attitude

Strategy

- Training Strategy Overall
- Promotions
- Stayed within budget
- Emphasis on communications messages/tracking
- Key constituencies/outlets identification & impact analysis regularly
- Provided more than enough room & communication for Post-GoLive Lab Support
- Willingness to be more vocal earlier & more often about CM issues, providing important perspective to teams
- Keep project plan up to date, constant reminders of deadlines & communications
- Re-address certain audiences and project plan after GoLive reschedule
- Changes to content were sometimes occurring post-development, systems/processes to inform CM Team about changes would have been helpful
- Give room for struggle/questions in transition
- Communication about training availability (notions or public schedule of when individual trainings will go live)

RECOGNIZE ACCOMPLISHMENTS

Recognize accomplishments

- Recognizing early successes and wins promotes ongoing change and future efforts
- Recognizing individual and group effort acknowledges the value of their extra effort
- Celebration acknowledges that something positive occurred
- Celebration breaks the routine and sparks creativity
- Accomplishments are easier to remember when marked with celebrations

Recognize accomplishments - ideas

- Take time in a team meeting or larger venue to acknowledge a milestone or outcome
- Establish ongoing department award
- Send written card or email to an individual or team from manager
- Bring food or drink to a meeting
- Give UCSF Bear Hug award
- Have parties



'Chartfield Charlie' given by Chart of Accounts team to training participants

PUBLICIZE POSITIVE OUTCOMES

Publicize positive outcomes - ideas

- Ensure your customers know the outcome and the impact on them
- Email to large group summarizing the outcomes (e.g. Dean email to entire school)
- Publish article in a relevant newsletter
- Post on website (department and/or BPI)
- Set a poster with results located in key places
- Prepare paper or presentation for colleagues



Tips for leaders recognizing success

- **Keep a record.** Pay attention to each success on your team and recognize efforts. Identify and reward achievements accordingly.
- **Make recognition sincere.** Ensure that the recognition you are giving is coming from a genuine place and comes across as so. Be specific with your praise.
- **Match the reward to the achievement.** It's important to scale your rewards – better rewards for bigger accomplishments. If the same reward is given for minor and major successes alike, it can breed discontent and hurt motivation.
- **Be spontaneous.** When rewards become too predictable or expected, it diminishes their effectiveness.
- **Hold yourself accountable.** As a leader, it's your responsibility to help keep your employees motivated and engaged.

CONTINUOUSLY IMPROVE

Continuous improvement does not end!

- Continue to monitor the changes made during the implementation step
- Return to the improvement list and tackle additional changes
- Do regular reviews of the process to increase value and decrease waste

