

Client Referral ERP Change Management

In 2001, a fortune 50 company hired my company to design and administer the change management component of a JD Edwards ERP implementation. A “Big Four” consulting firm was hired as the systems integrator. I hired Metcalf & Associates as a sub-contractor to be the on-site change management team lead.

Ms. Metcalf was quickly accepted as an equal on the team comprised of client managers and consultants. She attended not only project team meetings but also reported on the change management aspects of the project to the client steering committee.

Ms. Metcalf’s responsibilities rapidly grew, therefore, I hired another sub-contractor consultant to partner with her shortly after the project began. Ms. Metcalf and her partner supported the project team as well as helped create the tools and processes necessary to implement the new system across 38 different plants on three continents and four countries. Ms. Metcalf’s ability to create tools that were sensitive to multiple cultures and approaches was critical to her success. Additionally, she worked with the project team closely to manage retention issues.

Ms. Metcalf made significant contributions to the project’s success. Most notably, she:

- Significantly reduced time to proficiency and number of days to perform implementation for sites that used the change management tools compared to the sites that did not
- Increased buy-in and surfaced implementation issues in real time with key site constituents through job change workshops
- Developed the skills necessary to implement the ERP system and other initiatives by using detailed change management implementation tools
- Improved staff retention on a project that required 100% travel with high attrition risk
- Improved communication and acceptance of the system based on recommendations for tailored communication approach and tools
- Increased sponsor buy-in by directed high impact communications such as quarterly “road shows” and interactive sessions to solicit their input

The overall project deliverables and tasks are listed on the next page.

I would highly recommend Metcalf & Associates for any challenging organizational change project. Maureen’s tenacity, flexibility, ability to work in a team environment, ability to solve complex problems, and overall positive attitude made it a pleasure to work with her.

Deliverable	Tasks
Change Management Plan	Based on Readiness Assessment, create a change management plan to increase change readiness at the Wave 1 and Wave 2 sites.
Communication – messages to all stakeholder groups inside the company	Develop detailed communication plan defining stakeholders, communication frequency, and key messages. Write articles for: <ul style="list-style-type: none"> • Bi-weekly newsflash • Weekly extended team and back home communications • Mozart Notes upon completion of milestones • Standard Site Pre-live communication packages • Standard Site Go-live communication packages.
Change Readiness Assessment (Target Readiness)	Conduct Change Readiness Assessments to serve as the foundation for action planning with the sites.
Sponsorship and Commitment building at all levels	<ul style="list-style-type: none"> • Conduct Change Scorecard Assessment of Project Mozart to measure Program Management, Leadership, Tools and Support, and Communication and Ownership and report results to steering committee • Expand the Change Scorecard Assessment to sites when implementation team arrives at the sites • Conduct monthly information and planning sessions with site steering committees prior to implementation to facilitate information sharing and begin site ownership of decisions
Organizational Alignment (match job redesign to process redesign)	<ul style="list-style-type: none"> • Work with the Sites and the Process Teams to identify job impact by function and by role (change is job content and organizational structure) • Create generic job change discussions based on process flow documents created by the project team • Work with site implementation teams to identify key transition activities for sites. This consisted of conducting “Job Change Workshops” at each location to identify site specific jobs, training, staffing level changes, job combinations and support.
Training and capacity building – Project Team Coaching	<ul style="list-style-type: none"> • Conduct Core team coaching sessions to create understanding of change management requirements specific to their site
Change Agent Capacity building (Core Team capacity building)	<ul style="list-style-type: none"> • Assess the ability of each core team member and conduct individual coaching sessions to prepare them to be effective change agent
Cultural Change	<ul style="list-style-type: none"> • As part of the assessment, define cultural change and determine communication themes for ongoing site specific work
Change Management Tool-kit	<ul style="list-style-type: none"> • Create very detailed change management tools to be used by Cardinal employees to take over the change management role and build these skills internally