

Organizational Change Management Organization Architecture & Design

Omega Point is a management consulting firm that works with business groups to achieve high performance and increased value to their companies.

We help leaders strengthen and shape change management capabilities, implement new ways of working, realign and restructure, improve staff performance, and grow leaders to improve overall organizational effectiveness.

We have applied expertise serving clients in global firms in the following markets:

- ✚ Financial Services
- ✚ Pharmaceutical
- ✚ Government
- ✚ Healthcare
- ✚ Banking
- ✚ Retail
- ✚ Consumer Packaged Goods
- ✚ Chemical
- ✚ Manufacturing

Our experience and research focus in these areas: **business and IT management, business process management, organization design, and organizational change management.**

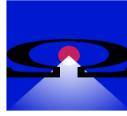
We know that the single most important aspect of our work is helping our clients manage the organizational change that comes with new ways of operating. New business processes and management practices are valuable only when they are implemented in a way that builds commitment to their use over time, and that ensures the risk factors of implementing change are addressed from the start.

We embed our practical experience in managing organizational and cultural change in every aspect of every project, whether it is a major reorganization, implementation of a new business process, establishment of new functions, or building change leaders. Our assistance in managing change is always woven into the context of the specific change initiative, as this is the most effective way to ensure the change is well understood and managed appropriately.

Our goal is to help organizations manage their transitions so that they:

- Achieve the objectives of the change
- Minimize productivity loss during transition
- Accelerate the transition
- Ensure that all transition elements are addressed
- Enable a smooth and ongoing ability to transition by providing the required transition management infrastructure

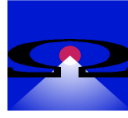
The following pages outline the types of assistance we typically provide in managing organizational change, as well as selected efforts in which we have been involved.



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Our assistance in organizational change management includes the following:

- Establishing and sustaining the sponsorship necessary for the change
- Clarifying the vision, performance goals, and implications to culture and day-to-day work practices
- Educating change agents and change leaders on their roles and expectations during the transition; coaching agents and leaders throughout the transition
- Designing new organizational structures, roles, governance mechanisms, operating models, and related organizational infrastructure
- Facilitating the definition of desired culture, assessment of current culture, and how necessary cultural changes will be accomplished
- Establishing transition teams and facilitating them to achieve the goals of the transition
- Facilitating the development of a comprehensive change implementation plan, monitoring mechanisms for change progress, and recommending course corrections
- Providing frameworks and techniques for managing change
- Mapping organizational dynamics and creating strategies to use the natural influence patterns within the organization to build commitment
- Planning communication efforts to support the transition and assisting in crafting communications and implementing the communication plan
- Assessing the risk factors regarding the change and recommending risk mitigation strategies
- Promoting quick wins and establishing and facilitating trailblazer efforts to deploy and proliferate changes in an opportunistic and managed fashion
- Ensuring that reinforcement mechanisms, such as performance management, rewards and recognition, and leadership behaviors are implemented to cement the changes; working with internal Human Resource departments to align all changes from an HR perspective
- Establishing measurement for the change, along with process and infrastructure to support ongoing measurement
- Delivering *Leading Change Across The Enterprise* workshops



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GLOBAL ERP IMPLEMENTATION: GLOBAL OFFICE PRODUCTS SUPPLIER

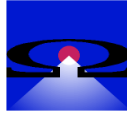
Worked with Executive Business Leaders, the Global VP of Organizational Development, and CIO, to plan and prepare for the business process, technology and organizational change elements of a global ERP implementation for a \$16B office supply company.

- ✦ Created the change management scope, strategy and transition plan
- ✦ Completed stakeholder analyses, specific changes and issues related to each stakeholder group, and an approach for engaging each group
- ✦ Facilitated business executives, business teams and technical teams in transition planning work sessions to:
 - ✦ Clarify the vision and specific elements of the future environment
 - ✦ Identify change impacts (technical, cultural, process, roles, etc.) and strategies to address them
- ✦ Identified and planned for organization structure changes necessary to implement the new business processes and technology
- ✦ Drafted overall communication architecture and specific communication plans by constituency
- ✦ Developed key communication materials for large group sessions and smaller, specific constituency group sessions
- ✦ Worked with the Global Learning & Development Organization to ensure training programs would address the business change impacts
- ✦ Coached business leaders in their change leadership roles, and provided change leadership training
- ✦ Provided information to ERP Project Management Office
 - ✦ Provided detailed task plan for all organizational change activities
 - ✦ Created a scorecard to measure progress on organizational change and training aspects of the implementation
 - ✦ Identified project risks and mitigation strategies related to changes
 - ✦ Participated in track leader and project leadership meetings
- ✦ Facilitated a cross-functional, customer-focused team to identify what the ERP changes would mean to customers and developed strategies for managing the impact
- ✦ Initiated and facilitated a Business Process & Policy group to work through key cross-functional policy and process issues
- ✦ Identified customer information governance needs and proposed structures and process for governance of the future environment

BUSINESS CHANGE MANAGEMENT METHODOLOGY DEVELOPMENT & DEPLOYMENT

For the same client above, developed and deployed a global Business Change Management Methodology

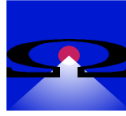
- ✦ Developed methodology, including phase and activity descriptions and a set of tools to be used for activities throughout a change project
- ✦ Educated and coached global Human Resource generalists and business leaders on the methodology through classroom and WebEx training and one-on-one coaching



**IT SUPPORT MODEL
TRANSFORMATION:**
LARGE HEALTHCARE
COMPANY

For a \$32B healthcare company, worked with the Corporate CIO, Corporate IT senior leadership team, Division CIOs, and Hospital IT Directors to facilitate the implementation of a new IT support model that reorganized a 3000 person IT organization to incorporate a division-level focus

- ✦ Facilitated work activity analyses to assess current work activities in light of the new model roles and staffing levels
- ✦ Facilitated process teams and field teams to define services to be performed at each level in the new model, to define new processes in support of the model, and to identify implementation issues
- ✦ Clarified jobs in the new model and created job descriptions and career paths
- ✦ Facilitated division-level IT leaders (CIO, IT directors, and Hospital IT Directors) in transition planning work sessions to:
 - ✦ Clarify the vision, services, and organization structure and roles
 - ✦ Provide feedback on the model to corporate leaders
 - ✦ Compile staff and skill assessments for current staff
 - ✦ Create new zone-based structures for IT support, and complete organization designs for the divisions
 - ✦ Identify staffing requirements at the division level
 - ✦ Develop a role validation process for mapping current staff to the new model
 - ✦ Create a transition plan for the divisions
- ✦ Facilitated design teams in specific parts of the new model, such as Customer Service Desk and Applications Services
- ✦ Developed transition plans for two trailblazer divisions implementing the model, including:
 - ✦ Recruiting and human resource activities
 - ✦ IT security, network and voice communications, customer service desk, platform & systems management, project management, and support activities
 - ✦ Governance activities
 - ✦ Organization design activities
 - ✦ Transition communication activities
 - ✦ Stakeholder engagement activities
- ✦ Coached division CIOs and IT leaders in their change leadership roles, and provided change leadership training
- ✦ Created a business value and capability metrics program to measure and monitor the business value being provided by the new IT support model and to measure progress in building comprehensive IT capabilities in divisions
- ✦ Provided project management support for the effort
 - ✦ Provided interim project management during the first six months
 - ✦ Managed issues and risks
- ✦ Built a Transition Toolkit containing information, techniques, templates, and other materials needed to implement the IT Support Model in all other divisions



**ERP
IMPLEMENTATION:**

GLOBAL CONSUMER
PACKAGED GOODS

Worked with business and IT leaders to create the business case for change, present the project to the Board of Directors, orient the business lead and other sponsors, and develop the early communication strategy for the effort.

Led the Business Transition Management team for a global ERP implementation, working with business leaders, teams, and other consulting firms, and across geographies, to facilitate the business transition.

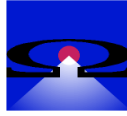
- + Created the change management scope, strategy and business transition plan
- + Completed stakeholder analyses, specific changes and issues related to each stakeholder group, and an approach for engaging each group
- + Facilitated business executives and business teams in transition planning work sessions to clarify the changes, impacts, and strategies to address them
- + Coached business leaders on the development of their business readiness plans of activities that must be completed in the business
- + Drafted overall communication architecture and specific communication plans by corporate, plant, and geography
- + Developed key communication materials for large group sessions and smaller, specific constituency group sessions
- + Led the development of the training strategy and plan and provided oversight to the training lead and training developers
- + Coached business leaders in their change leadership roles, and provided change leadership awareness sessions
- + Provided detailed task plan, status, and risks for all organizational change activities
- + Worked with the IT team to ensure that the organizational change management activities related to enhanced infrastructure needed for the ERP system were well-managed

**OPERATING MODEL
IMPLEMENTATION:**

GLOBAL BIOTECH
COMPANY

Worked with the CIO, IS leadership team, change network, and implementation change action teams to implement a new IS operating model, organization structure, and culture

- + Established and facilitated a 60 person change network to provide feedback on details of operating model processes, roles, behavior & culture, conduct impact assessments, communicate work and decisions to the organization, and lead others through the changes
- + Developed detailed implementation plan, provided status to IS leadership, identified risks and mitigation strategies
- + Integrated the implementation plan with other IS initiatives underway, such as COBIT implementation
- + Coached CIO and leadership on their change leadership role to ensure implementation success
- + Created change implementation scorecard to assess results of the implementation and facilitated discussions with leadership on ways to accelerate changes and address the response of employees
- + Work hand-in-hand on all aspects of change activities with related Corporate groups, such as HR and Corporate Communications



**IT TRANSFORMATION
EFFORT:**

GLOBAL FINANCIAL
SERVICES FIRM

Worked with the CIO and IT senior leadership to define a transition plan for the replacement of all core systems and architecture, to implement a performance-based culture, and to reorganize the IT organization

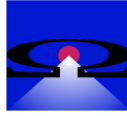
- ✦ Educated the leadership team in organizational change management concepts, techniques, and leadership skills
- ✦ Defined the transition plan and helped leaders to implement it
- ✦ Facilitated work sessions to clarify the vision, build the case for change, commit resources, and address transition issues
- ✦ Worked with an internal communication group to facilitate all aspects of the communication for the change, including design of manager forums, communication messages, and communication planning
- ✦ Work with leaders to define and implement the new organizational structure, governance structure, and key roles and functions
- ✦ Work with HR executives on workforce planning issues, virtual teaming issues, IT leadership development, dynamic teaming, and working across organizational boundaries
- ✦ Performed a change implementation risk assessment

**IT REORGANIZATION
& TRANSFORMATION
EFFORT:**

LARGE HEALTHCARE
COMPANY

Worked with the CIO and IT senior leadership team in two organization redesign efforts several years apart; redesigned the organization structure and work practices of a 1000-person IT organization, to align to their changing mission

- ✦ Worked with leaders to define culture and values for the organization and to guide culture changes
- ✦ Facilitated the development of operating models, role definitions, and responsibilities for new competency centers in:
 - ✦ IT Strategy & Planning, Quality Management, Project Management, Advanced Technology & IT Architecture, Security, and Education & Employee Development
- ✦ Conducted leadership team retreats to focus on organizational effectiveness, strategic thinking, and leadership team development
- ✦ Guided the implementation of the new organization structure through a set of transition projects and teams; completed role clarity work, including role definitions, competency models, and career paths
- ✦ Developed the change leadership skills of IT leaders at middle levels of the organization through bi-weekly experiential sessions, reading plans, coaching, and facilitation of changes in their groups
- ✦ Coached senior leaders in their role, advised on all aspects of the transition, and facilitated weekly progress meetings
- ✦ Facilitated process improvement in work management, business-IT partnership, software certification, project and portfolio management
- ✦ Shared industry IT management practices, processes, and research, and connected leaders with organizations that implemented similar changes



**IT TRANSFORMATION
EFFORT:**

REGIONAL BANK

Served as advisor and coach to a technology services design team responsible for implementing a new organization model

- ✦ Assessed alignment of proposed organization model and structure with IS strategy and objectives, identified gaps, and recommended modifications
- ✦ Defined a set of implementation programs
- ✦ Identified and defined new IS roles, such as Technology Process Manager, to support new organization design
- ✦ Defined new relationship management role and function
- ✦ Defined new work load planning process to support the flow of work from relationship managers into the development groups
- ✦ Outlined communication strategies and plans to support the implementation of the new organization model
- ✦ Supported and coached the team through the transition

**STRATEGY
DEPLOYMENT:**

REGIONAL BANK

Facilitated the development of a new IT strategy, and the refreshing and deployment of this strategy each year

- ✦ Assisted in architecting an overall improvement framework and implementation plan
- ✦ Coached IT leaders and change teams in programs for a continuous learning process, relationship management, organizational change management, IT process deployment, quick hit projects, service level agreement (SLA) development, balanced scorecard measurement, portfolio management, and trailblazer projects
- ✦ Delivered change management education sessions to managers and staff levels
- ✦ Facilitated the definition of desired culture changes and their implementation

**ORGANIZATION
TRANSITION
PLANNING:**

GLOBAL CHEMICAL
COMPANY

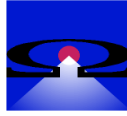
Facilitated the development of a transition plan for a new department organization design for a global chemical company

- ✦ Facilitated discussions about implications of new organization structures
- ✦ Surfaced cultural change issues that were core to success
- ✦ Facilitated off-site meetings of global department leadership team on vision and structure of new organization
- ✦ Developed transition plan for organizational changes

**CHANGE
MANAGEMENT
COACHING:**

CANADIAN ENERGY
COMPANY

Coached the transition coordinator and transition council at the launch of a change initiative related to changing all aspects of their systems strategy and application development processes



**ORGANIZATION
INTEGRATION
EFFORTS:**

HIGHER EDUCATION
INSTITUTION

Worked with the CIO and IT senior leadership team to analyze and integrate two separate IT organizations that resulted from an ERP implementation project

- + Led process to assess two separate IT organizations that were to be integrated
- + Led mapping of current organizations into new organizational model with IT Leaders from both organizations
- + Shared knowledge of leading IT management practices, processes, and organization designs
- + Facilitated the analysis and sizing of the new organization
- + Guided the implementation of the new organization structure with Human Resources and the IT Human Resources groups
- + Developed the skills of IT leaders at middle levels of the organization through one-on-one coaching, and facilitation of particular changes in their groups

**GLOBAL SHARED
SERVICES IT
SERVICE
MANAGEMENT
IMPLEMENTATION:**

DRUG DEVELOPMENT
SERVICES COMPANY

Worked with CTO and leadership team to plan and initiate implementation of organizational change activities in support of several major initiatives related to global infrastructure services (e.g., technology enabled workforce, IT service management, transition to cloud infrastructure, transition to 'IT as a service') in a \$2.2B drug development company

- + Created and integrated change management plan into overall plans for implementation
- + Launched a Change Ambassador group to help facilitate the changes within the organization
- + Facilitated research and discussions regarding the future state of organization design based upon the related infrastructure changes taking place
- + Facilitated work sessions to assess change impact
- + Coordinated with communications group and provided raw input, tone and strategy related to communications

**LEADING CHANGE
WORKSHOP**

Developed and delivered a 2-day ***Leading Change in IT and Across the Enterprise*** workshop to over 50 companies

Delivered leading change education to leadership and teams throughout each consulting engagement