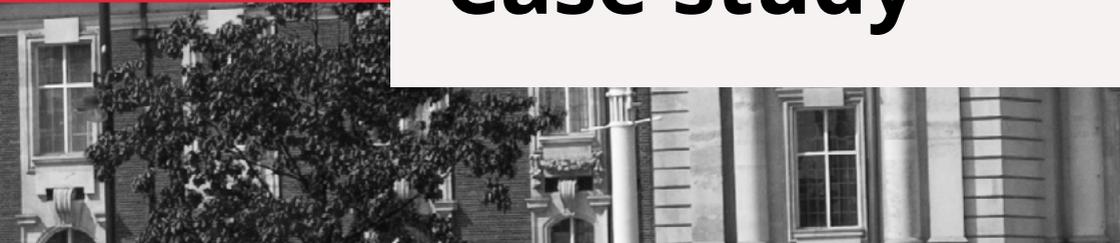




Cloud/ERP: Change management and engagement

Case study



“The Socitm team have guided us through the programme from inception to go-live and all of the Socitm Advisory team have responded enthusiastically to the demands of the brief to enable us to deliver the programme successfully.”

Christina Thompson – Senior Responsible Officer and Director of Finance

Project name

Change management and training delivery support. Phases 1, 2 and 3 were undertaken between July 2017 and April 2018.

Partners

Evosys Global were appointed as Lambeth Council's systems implementer for Oracle Cloud. Socitm Advisory worked closely with Evosys during all phases of the programme to deliver effective engagement and communication materials.



“The successful go-live is a tribute to the close working relationships between the Lambeth, Evosys and Socitm Advisory teams.”

Christina Thompson – Senior Responsible Officer and Director of Finance

Client

Lambeth council are a longstanding Oracle 'house' based in West London. The organisation is familiar with Oracle E-business Suite products and it has met business needs since its original implementation in 2003. In 2012, Lambeth became part of the One Oracle Partnership with the London boroughs of Brent, Croydon, Barking and Dagenham, Havering and Lewisham, procuring a solution jointly to provide an ERP platform based on Oracle technology.

The contract for support for all seven councils was extended until July 2018, giving time for each council in the partnership the opportunity to review their requirements for HR, finance, procurement and payroll systems. Lambeth decided to undertake a migration to Oracle Cloud, Oracle's latest cloud-based ERP solution, as they felt it was prudent and important in terms of stability to remain with a known product to reduce the risk around change and implementation as well as forward plan for R12 obsolescence.



“Socitm Advisory ensured that in evaluating the options going forward that we understood the size and complexity of the project.”

Christina Thompson – Senior Responsible Officer and Director of Finance



Services used

Socitm Advisory has previously worked with the seven One Oracle councils, including Lambeth, to support the initial phases of a review of the partnership and have been providing the following support:

- 01.** Worked with the seven One Oracle partners to review and evaluate the potential options available to the partners.

- 02.** The provision of a separate, short support to each of the individual partners to allow them to understand and evaluate their own options for their ERP requirements from the end of the current One Oracle agreement.

- 03.** Programme management support through a dedicated programme director to support the partnership in its off-boarding activities and in areas of common interest going forward.

- 04.** Support to individual councils in the development of their options appraisal and business cases to underpin their decision on their future direction.

- 05.** Support to individual councils through the provision of specialist programme managers and project management resources (in finance, procurement, HR and payroll) to support the delivery of their programmes.

- 06.** Procurement advisory support to a number of the councils in the selection of a systems integrator to implement the preferred solution.

- 07.** Independent assessment of individual council's programme delivery and implementation.

Detail

Brief

Lambeth requested a proposal to deliver change management and engagement activities for their extensive ERP implementation programme, which encompassed process, technological and behavioral transformation. The programme presented the authority with both a challenge and an opportunity to improve staff, customer and supplier experiences, at the same time as meeting a reduced funding envelope. This programme was a part of their Your Future Lambeth campaign, which aims to invest in its people, technology and workspaces to deliver high quality services for its residents.

The authority was keen to implement processes that would minimise handoffs between support teams and in turn reduce failure demand driven by fragmented and flawed processes. In addition, they required the change consultants to help them address and improve the levels of compliance with using the system within the organisation.

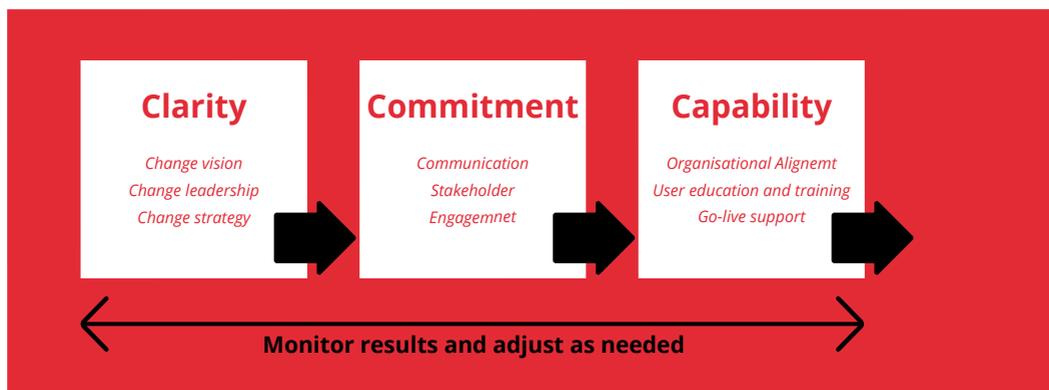
Approach

For this assignment our consultants worked in project phases, delivering outputs in each phase which directly linked and built upon the previous phase and prepared for the next phase. This approach allowed Lambeth the opportunity to flex the scope for the next phase based on the emerging requirements as the technical programme developed.

The change management strategy and plan underpinned each phase. Outlining the delivery approach for Lambeth which can be summarised as follows:

- **Clarity** – around purpose and objectives
- **Commitment** – Building awareness and buy-in across the organisation
- **Capability** – ensuring the organisation has the capability to implement and sustain the change

The underpinning components of these pillars are illustrated in the diagram below:



Solution/implementation

Phase one: Change management strategy and communications plan

Socitm Advisory's analysis included conducting interviews with key stakeholders identified through stakeholder mapping (see diagram A). The aim was to build a strategy which aligned the ERP programme to the authority's wider transformation programmes clearly define the vision for Oracle Cloud in Lambeth. Our consultants used an organisation impact

assessment to understand the amount and complexity of change which would be brought about by the implementation of the Cloud ERP solution and used this to create a communications plan. In addition, they facilitated workshops for to be process mapping in key areas of change to help the authority make decisions about how they might take advantage of the functionality Oracle Cloud provides.

Pre-implementation support is key to understanding the change journey for the organisation. Part of this is defining the current level of confidence in the synergy between the finance chart of accounts/budgets, hierarchies and HR establishment. Without this understanding and a common approach, an ERP system cannot function correctly. Diagram A below illustrates the stakeholder mapping for the Lambeth ERP programme:



Phase two: Training needs analysis and delivery of the change management strategy and plan

Using the outputs from phase one, our change consultants worked closely with business SMEs to define the training needs of both key users and end users within the council to create a training needs analysis. Continuous delivery of interventions as outlined in the change management strategy and communication plan was undertaken with the focus being the raising of awareness, desire and knowledge of the ERP programme by engaging users about its benefits and the key changes as per the ADKAR change model.

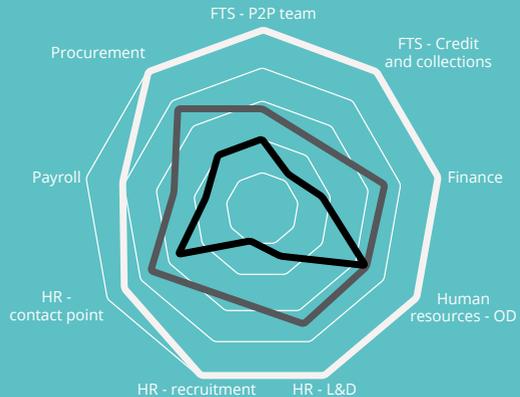
Phase three: Training plan and business readiness

Lambeth asked Socitm Advisory to provide assurance that key users held the capability to undertake system activities after their completion during key user training, which was included in the contract deliverables for Evosys, the system implementer. A gap analysis was conducted using an online survey tool and, through consultation with SMEs, the consultants produced a plan with options for delivery of additional training so that key users felt confident that they were able to complete their role on Oracle Cloud.

Business readiness assessments and action plans were developed for each key user team, Oracle Cloud module and directorate within the council. Our consultants took ownership of each business readiness action plan to help SMEs manage the activities required for each business and end user area to be ready for the go live. To evaluate business readiness, a rating model was established by using a rating scale. Short, sharp surveys were used to baseline and monitor each area's progress along that scale up to and after the go live. Diagram B (see below) is an example of the evaluation model presented to the programme board on a fortnightly basis to track business readiness.

Business readiness tracker

- Baseline rating - Pre KUT
- Post KUT rating
- Target overall rating



Our change consultants continued to deliver change and engagement interventions as defined in the change management strategy and communications plan, including;

- Running show and tells of employee and manager self service to address noncompliance
- Engaging with end users in interviews and group sessions on key topics,
- Writing communication materials for all and specific users using intranet articles, social media groups etc
- Delivering training sessions outlines and producing end user support materials (manuals and step by step videos) which were embed into the solution

This was completed on a needs basis, tailored to each business and directorate area throughout the final phase including post go live of Oracle Cloud. Often the transition to business as usual after such a transformative programme can be challenging. To help mitigate the risks, our consultants produced Implementation plans for each professional user area to ensure responsibility for all programme activity was transitioned effectively in to “business as usual”. Any actions required to deliver ongoing change and engagement interventions were identified and planned with the SMEs to maximise the benefits of the implementation not just at the go live phase but in following years.

Outcomes

The primary outcome – to deliver a change management and engagement programme that ensured users had the knowledge and capability to transition to the new way of working at the Oracle Cloud implementation – was delivered ready for the go live phase. The business readiness trackers ensured that the delivery was understood throughout the last phase of the programme and drove activity in the business to ensure successful processes and documentation was in place. Our focus on hard to reach areas and areas of low compliance addressed the usage of the new ERP system overall.

Improved processes were developed, which included automation of overtime claims, development of an online process for monitoring of capital projects spend and the development and implementation of a self-service recruitment process and model to support meeting the reduced funding envelope. Additionally, processes and activities put in place during the programme assisted Lambeth with the future change impacts from updates of the Oracle Cloud system which now undertakes numerous small updates throughout the year.

Additional information

During the programme our consultants produced various communications for different stakeholders. Please see some examples of those produced for Lambeth:

- Postcard produced for a Strategic Leadership Forum earlier in the programme to raise awareness amongst senior stakeholders
- Show and tell presentation produced to aid in training employees and managers in groups how to complete various HR related processes and tasks in Oracle Cloud



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