

# The Organizational Readiness Scorecard

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# Definition

The Organizational Readiness Scorecard is a structured roadmap of key activities that need to occur to effect organizational change:

- Executive Summary
- Checklists/Action Plans
- Reports

Scorecard Example

Indicator	BU1	BU2	BU3	BU4
1. Leadership	Green	Green	Green	Green
2. CIT Support	Green	Green	Green	Green
3. User Involvement	Yellow	Red	Red	Green
4. Communications	Green	Green	Green	Green
5. Data Readiness	Yellow	Red	Yellow	Green
6. Training - Deployment Readiness	Green	Green	Green	Green
7. Training - Attendance	Yellow	Yellow	Green	Green
8. Support	Green	Green	Green	Green
9. Reporting	Yellow	Yellow	Yellow	Yellow
10. Overall Day 1 Readiness	Green	Green	Green	Green

# Background

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- Client Information
  - National Professional Services Firm (33,000 employees)
  - Critical financial system implemented in 2005
- Change Management Strategy
  - Central to risk-mitigation strategy
  - Huge mobilization effort required
  - Remote workforce required communication through informal networks and personal influence
  - Change Network (Change Initiative Team) established; approximately 400 members of senior management represented four business units across the U.S.

## The scorecard was used to:

- Determine organizational readiness at key points allowing enough time for corrective action
- Provide a monthly ‘at a glance’ report for executives
- Provide a roadmap of all activities required to prepare the organization for implementation
- Define a standard process to measure readiness

- Pre-requisites:
  - Defined success criteria
  - Agreed upon change dimensions and actions
- The process is comprised of a series of iterative steps:
  - Checklists – determine the actions that should be complete in the defined timeframe
  - Assessments/Data collection – surveys and interviews validate that the actions were completed
  - Reports - summarize the assessment findings

# Change Management Dimensions

<b>Leadership</b>	To determine the support of organization leaders and the extent to which they are actively sponsoring the implementation.
<b>Change Team Support</b>	To measure the effectiveness of the change teams in each business unit and region. This will help us to determine how the teams are positioned to assist with the change and deployment efforts.
<b>User Involvement</b>	To measure the participation and involvement in user acceptance testing.
<b>Communications</b>	To determine the effectiveness of both formal and informal communication plans and whether or not they are serving to inform and integrate intended audiences.
<b>Data Conversion</b>	To assess whether or not responsible parties are clear on all activities required for a clean data conversion.
<b>Training – Deployment Readiness</b>	To assess Superuser readiness to deliver training to the organization.
<b>Training - Attendance</b>	To assess participation in available training programs.
<b>Support</b>	To assess preparedness to support the organization once the system is live.
<b>Reporting</b>	To measure the organization's understanding of how well each group understands the new reporting process. (E.g., which reports are generated, how often, who receives them.)
<b>Overall Day 1 Readiness</b>	To assess how well the organization is positioned (informed and clear) on miscellaneous activities that will occur when implementation is imminent.

# Outcomes

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- Provided early indicators when change management plans were not addressed
- Resulted in a successful Implementation
  - Business case / anticipated benefits were realized
  - Maintained business activities without adverse impact

# Instructions

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- How to build your own change readiness scorecard and report progress
  - Step 1 – Define success criteria
  - Step 2 – Define the change dimensions needed
  - Step 3 – Assign activities and responsibilities
  - Step 4 – Track progress & report
  - Step 5 – Provide corrective action and risk mitigation plans (as required)

# Conclusion

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- The Organizational Readiness Scorecard can be used to:
  - Clearly articulate required change activities
  - Measure and track agreed activities
  - Maintain sponsor and organization accountability
  - Succinctly report progress