

Change Management - Why Change?

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INTRODUCTIONS

PAUL HOCH - PRINCIPAL ARCHITECT

- Over 13 years experience delivering EPM solutions to Fortune 1000 companies
- Specializations include enterprise performance management, business intelligence, data warehousing, and custom application configurations
- Planning, Forecasting, and Analysis domain expert
- Hyperion Certified Trainer
- Product specializations include Hyperion Planning and Hyperion Essbase and supporting products

Representative Sample of Clients

- Allianz Global Investors
- Blue Shield of California
- CooperVision
- Earle M Jorgensen
- Estée Lauder
- Lockheed Martin
- Northrop Grumman
- TransOcean



Acknowledged leaders
in designing,
implementing, and
deploying EPM solutions



Preferred Oracle
Hyperion solution
partner for many of the
largest and best
performing Global
2000 companies



World-class solutions
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across all industries



Over 1000 successful
implementations for
more than 400 clients



Average 20 Years
combined Hyperion and
industry experience



Oracle Partner





CHANGE MANAGEMENT

“The world is changing very fast. Big will not beat small anymore. It will be the fast beating the slow.”

~ Rupert Murdoch

“Change before you have to.”
~ **Jack Welch**



WHAT IS CHANGE MANAGEMENT?

Change management is the mechanism for introducing change into the organization. It includes deliverables and tactics, with an end goal of maximizing adoption throughout the enterprise.

Most organizations approach such changes in the context of system upgrades and departmental solutions with the idea that this is how to achieve their stated goals. The fact that any new technology implementation represents an opportunity to review, improve and/or streamline the underlying processes is frequently overlooked.

Change is a consistent process and companies should strive to be forward thinking by continuously evaluating change.

Understanding the elements of change you want to manage, and how to manage them, is critical when approaching an EPM implementation.



COMPONENTS OF CHANGE

Successful change management requires thorough analysis of these four components:

- **Process**
- **Technology**
- **People**
- **Corporate culture**

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PROCESS

- Opportunity to evaluate where you are
- Define where you want to be
- Improve and streamline underlying processes
- Goal is to improve efficiency while reducing effort

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- Corporate culture

TECHNOLOGY

- Business needs and supporting technology must be aligned
- IT involvement is crucial in defining the goals of the change
- Business needs and supporting technology cannot be mutually exclusive

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PEOPLE

- People and culture are most often the points of failure for any IT implementation
- Stakeholders must be involved in every step of the process to ensure a successful technology implementation
- User acceptance and buy in is paramount to a successful implementation, and will be more likely to occur if users feel that they are part of the solution

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- Process
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- People
- Corporate culture

CORPORATE CULTURE

- A change in people and/or technology is going to effect the corporate culture
- Culture is the foundation of the organization's processes
- Defines the magnitude of change that can be absorbed in any given project
- Encompasses the people and the organization and their responsibilities

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- **Technology**
- **People**
- **Corporate culture**



CHANGE MANAGEMENT AND EPM IMPLEMENTATIONS

INITIATING THE CHANGE

- Validate and understand the complexity of an EPM implementation
- Identify key benefits and opportunities
- Identify risks and challenges
- Create and validate a high level project plan with key milestones
- Identify internal resource requirements
- Identify external resource requirements and costs
- Develop a senior management presentation that includes project goals, scope, deliverables, timelines and estimates

KEYS TO A SUCCESSFUL IMPLEMENTATION

- A successful implementation begins with requirements gathering, and can only be achieved with a carefully planned design, a detailed project plan, strong project management, and clearly defined, achievable and measurable goals and objectives.
- Success includes the implementation of better and more efficient business practices and processes.
- Executive management is a stakeholder and must be willing to implement change, drive the organization to adapt their business processes to the new models and lead the project to success.
- The CFO and CIO must work together to champion a change initiative.

KEYS TO A SUCCESSFUL IMPLEMENTATION (Con't)

- Prepare a risk management and mitigation plans.
- Change management control is necessary to ensure that the project stays on track, and any changes to the scope of the project are addressed and documented.
- All team members should have a sense of ownership and accountability for the success of the project.
- Create a vision of how the technology, process, and people can work together and how the culture can adapt to facilitate this change.

A successful EPM implementation will change how people work. It will fundamentally change how business is conducted and how business decisions are made.



Q&A



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