

## Keys to Successful Operations and IT Transformations

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Two questions arise today for the members of senior leadership spearheading business transformation:

1. Do you possess a crisp vision of a successful transformation?
2. Do you know what it will take to operationalize that vision?

On the following page, ten elements of program management are named and defined in brief. Their relative priorities may be subjective, but these are the keys to instituting most any broad change across an organization.

Within the context of a traditional project (e.g., the integration of a new technology, or a revised approach to recovering lapsed policies), these elements provide guidelines and check points, essentially constituting a To Do list for management. In the context of transformation, however, they are avenues for communicating, activating and maintaining the senior leader's vision of the transformation. If a transformation is pursued like a traditional project, it will fail.

Three components in particular – Governance, Change Management, and a strong Charter – are cornerstones of a successful transformation.

### Governance

Transformations are hung on the framework of good governance. Central not only to the design but to the implementation and the maintenance of a program, effective leaders create structure, instill discipline, and assume responsibility for brisk decision making. When governance is well managed, the same criteria for success — focused priorities, well-defined responsibilities, efficient problem resolution — are integrated into every level of operations.

### Change Management

Change management encompasses the processes, tools and techniques used to manage the people-side (employees, teams and organization) of change to achieve the required business outcome and future end-state vision. Large transformational efforts require the time, commitment and effort of resources throughout the organization, therefore, change management is a critical component from the start of a program through the very end. The approach for managing change must fit the social infrastructure and culture of the organization; leveraging organizational strengths to develop a culture that will support the end-state vision. A heat map of impacted stakeholder groups will help guide where, when and how change management needs to be engaged.

### Charter

At the outset, the transformation launches with the charter's clear and formal articulation of what is to be achieved — and how. Unlike the project plan which maps out a traditional project — and then is left to gather dust — the charter is an opening salvo that articulates the vision and its values.

The charter is more than a document: it's a promise between senior management, employees, and clients, and in many cases is the funding vehicle for the program. Rather than being shelved once the project is underway, the charter should be front and center, repeatedly being revisited and revised over the course of the transformation — ideally, by an objective third-party monitor who is unencumbered by the project's current status, whether it's stalled or progressing on schedule.

## ELEMENTS OF A SUCCESSFUL PROGRAM MANAGEMENT STRATEGY

1. **Charter:**  
What you are setting out to accomplish, and why.
2. **Governance:**  
How all the players will work together and monitor progress.
3. **Change Management:**  
Understanding and communicating how the project will impact your employees and other stakeholders
4. **Communication:**  
What information is needed for each audience and how will it be delivered.
5. **Change Control:**  
The process used for managing and balancing changes to the plan, schedule, and budget.
6. **Solid Maintained Plan:**  
An evolving roadmap for outlining roles and responsibilities.
7. **Top Notch Team:**  
Brings the cross disciplined experience and ability to integrate and deliver.
8. **Senior Level Commitment:**  
Support of leadership who will remain focused on the promise, respond to challenges as they arise, and make solid decisions.
9. **Risk Management:**  
Proactive – and reactive – identification, assessment, mitigation and management of risks.
10. **Voice of the Customer:**  
Ensures alignment between what your customers value and expect and what you deliver.

The need to be adaptable is paramount in a transformation, and this is where governance, change management, and charter all converge. A transformation is an evolving mission, a vision brought to life by teams who share priorities and revise goals as needed midstream while maintaining laser-like focus on the endgame. With awareness of the critical components in play, and the capability to implement them with skill and purpose, business leaders can seize that once-in-a-career opportunity to rebuild an organization's culture and identity.