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Change Management: Achieving User Buy-In A Case Study

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Executive summary

- Identify a technology strategy that leverages a framework for effective, efficient business readiness

- Prioritize based on risk with a focus on innovation

- Focus on innovation that helps the lines of defense solve problems in new ways

- Keep innovation a priority by focusing on business partners that are ready, willing and able to enable new capabilities

- Use the implementation process to build trusting relationships by helping business partners resolve inefficiencies

Who are we?

Prioritize innovation using technology and analytics that address business needs and help enable the lines of defense to work more efficiently.

- Develop and maintain applications, tools and processes that help manage and organize data

- Implement solutions that can easily be transitioned to stakeholders across the enterprise

MetricStream

Automation and Data Analytics

Technology and Strategy Solutions

Consulting Engagement

Divisional Operations

Data Intake and Management

Report Configuration and Management

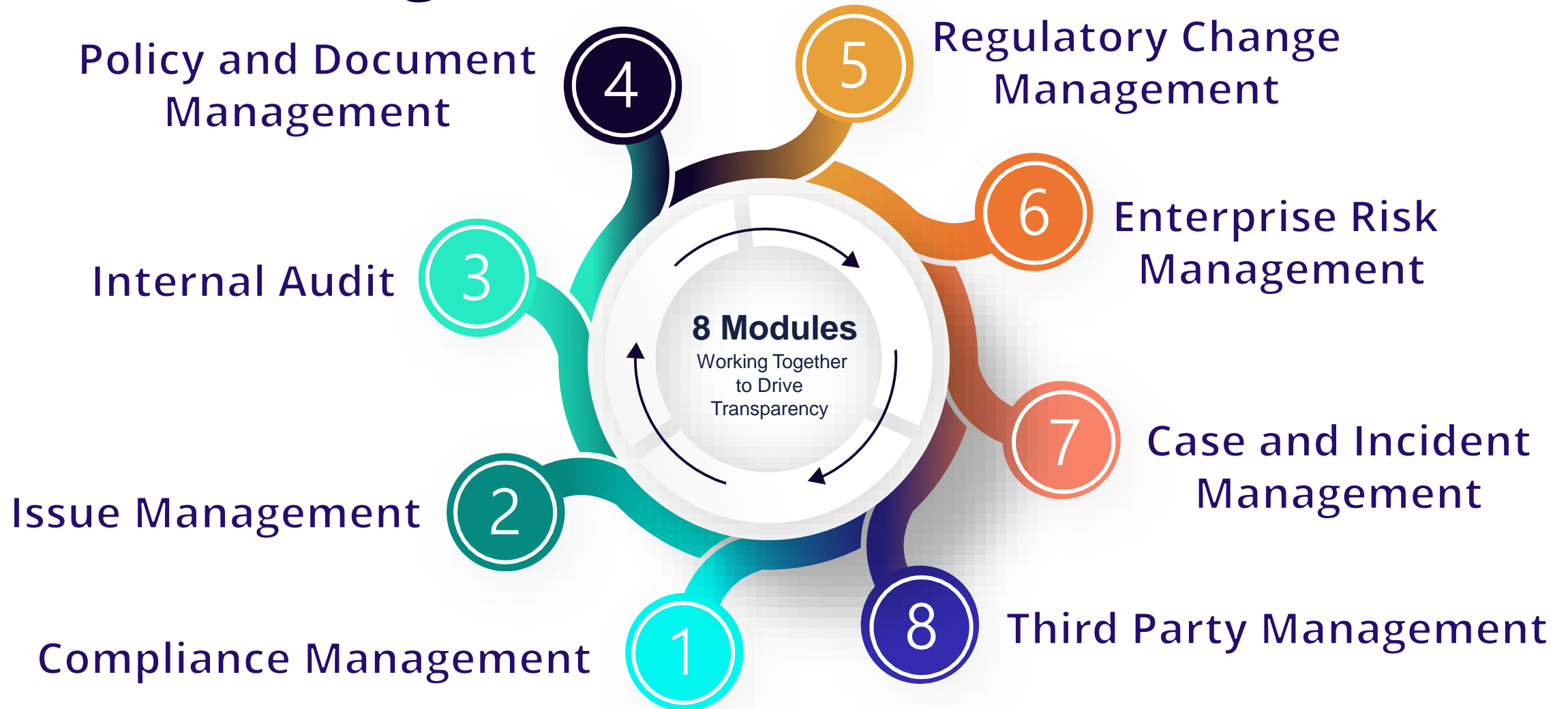# Prioritized innovation helps us evolve and work efficiently

Siloed

Assorted

Integrated

Prioritized rollout enabled success by addressing need

Policy and Document Management

Regulatory Change Management

Internal Audit

Enterprise Risk Management

Issue Management

Case and Incident Management

Compliance Management

Third Party Management

8 Modules
Working Together to Drive Transparency

Three steps to success

Ready
Business areas are prepared to act and have defined processes.

Willing
Business areas are eager to evolve and understand the value of innovating.

Able
Business areas are ready to enable change and can dedicate the necessary time to support implementations.

Regulatory Change Management:
A case study

- Received a large volume of regulatory bulletins that could affect operations across 50 states

- Required ability to identify, triage and implement change

- Leveraged subject matter expertise to:

  - *Assess impact*

  - *Identify next steps*

  - *Take action as needed*

- Configured an integrated, repeatable, transparent and Audit-ready process:

  - *Centralized repository*

  - *Audit trail*

  - *Automated notifications and reminders*

Is the business Ready?

Understanding the current process

- Decentralized intake from various sources across multiple domains
  - *Inefficient and cumbersome*
- Unorganized assessments tracked by email with no accountability
  - *Scattered and complicated*
- Missed bulletins from key sources due to poor tracking from multiple sources
  - *Unorganized and decentralized*

Answer: Yes!

Is the business Willing?

Show value that resonates with business partners: Why should they adopt RCM?

- Centralized, authoritative source provides one channel to focus your energy on

- Simplified regulatory intake workflow, automated email notifications and personalized task list

- Leveraged out-of-the-box task reassignment, follow-up and action steps for easy collaboration

- Detailed reporting, audit trail and dashboards offer real time accountability, assessments status and actions taken

Answer: Yes!

Is the business Able?

They are READY. They are WILLING. Help them become ABLE.

- **Develop** the solution with channel plug-in, triage setup, assessment workflow build and reporting callibration

- **Train** users through live sessions and provide detailed step-by-step guides and videos

- **Support** the users with mailbox support, open office hours and warranty period/enhancement in year 2+

Answer: Yes!

Lessons Learned

- Build trusting relationships by being good consultants and showing results that provide superior outcomes
  - Email notifications help. Too many can cause confusion
    - Identify the key notifications
    - Set up Outlook rules
  - Don't over prescribe workflow
    - Too many options can overwhelm
  - Identify the key reporting metrics before suggesting report enhancements
    - Custom reports can deliver value, but it may take time to know what matters
- Challenge decentralized silos and embrace optimized, integrated solutions that help business partners solve problems in new ways

QUESTIONS?