Design and Change Management

Change Management playbook

September 2023

Purpose of the playbook

Background and context

- Change management is a sub-discipline within the broader Design and Change discipline in bp
- As bp continues to invest in digital, the change discipline will lead the way in putting our customers at the centre of change
- Change has three distinct value propositions – Increase adoption, enhance productivity and minimize disruption – underpinned by a clear change framework outlined in this playbook

What is the purpose of this playbook?

- Creates a standard and simplified framework for the change team to follow
- Outlines our approach to change management within the digital business in bp
- Integrates best practices, tools, and strategies for managing change across digital at bp
- Demonstrates our approach to change and our methodologies to other bp stakeholders

Who will use this playbook?

- **Primary audience**: Change team within the broader Design and Change discipline
- **Other stakeholders with a keen interest in change:** e.g., Product team members, senior Digital leaders

How will this playbook evolve over time?

- This document provides an overview of our change approach as of September 2023
- It is a 'live document' that will evolve as the change discipline continues to mature
- Any updates will be made by the Change team who are the owners of this playbook

How to use this playbook

This playbook has been designed to outline the catalogue of best practices, tools, methodologies and strategies for managing change across digital in bp.

However, it is recognized that each change initiative and end-user journey is unique.

As such, change practitioners may draw on relevant elements for the specific needs of their change initiative, and select the right mix of tools and artefacts.

Introduction & purpose: Explains who this playbook is for, how it is designed to be used, and how it can support our internal customers.

Our change point of view: Explains who the change team is, what we do and how we do it.

Change management components:

- **Frameworks & methodologies:** Bringing to life each element of our change activities
- **Tools & templates:** Leveraging our best practice tools and templates to for each of our change components
- **Top tips:** Key tips for each change component in addition to considerations for our organizational context.

Additional considerations: Include helpful guides and documentation which sit outside our traditional core change activities, and aid in the change journey

Change playbook catalogue

Change artefact	Description	Key activities		Available tools and enablers
Change planning	Identifies required change artefacts, planning out and monitoring change activities.	✓ Develop change approach/plan ✓ Define team ways of working	✓ Manage and monitor delivery of change activity ✓ Handover change activities	○ Change plan on a page
Case for change	Articulates rationale for change and key messages to communication to customers. Includes the development of a value proposition statement.	✓ Review documentation and engage key stakeholders ✓ Develop CFC content and value proposition (if required)	✓ Incorporate into comms materials and iterate as initiative progresses	○ Value proposition canvas ○ CFC framework and example
Change impact assessment	Evaluates how stakeholder groups will be impacted by the change (type and scale) to inform interventions.	✓ Gather/identify changes ✓ Engage to validate changes and impacts	✓ Develop CIA summary and share	○ Change impact assessment tool ○ Change impact summary template
Stakeholder management strategy	Clarifies stakeholders impacted by the change and how best to engage them for the duration of the initiative.	✓ Identify key stakeholders ✓ Analyse and understand key stakeholders	✓ Develop stakeholder mgmt. plan ✓ Execute activities and monitor	○ Stakeholder register
Communications and engagement	Provides a formal framework to plan, structure and manage communications and engagement activity.	✓ Review stakeholder analysis ✓ Develop communications approach	✓ Create communications plan ✓ Deliver communications	○ Communications plan ○ Communications plan example
Training strategy	Provides a framework to assess training requirements and develop interventions to support the change.	✓ Conduct training needs analysis ✓ Design training content	✓ Determine delivery approach ✓ Evaluate training effectiveness	○ Training needs analysis
Business Readiness	Focuses on identifying critical actions needed before a change is implemented to aid customer acceptance.	✓ Define readiness criteria and approach ✓ Develop readiness assessment	✓ Identify areas needing support ✓ Confirm readiness acceptance and transition	○ Business readiness assessment
Customer Feedback	Understanding the effectiveness of change interventions on customers across the change journey.	✓ Determine approach ✓ Validate assumptions and develop questions	✓ Distribute and perform analysis ✓ Present results	○ Example Survey
Change Reinforcement	Ensures changes made become the 'new norm'. Begins at the start of an initiative and continues past go-live.	✓ Identify change reinforcement requirements	✓ Deliver change reinforcement activities ✓ Monitor progress	N/A

“What we do and how we do it”

Why do we need change management?

Change management is the application of a structured process and a set of tools to lead the human side of change and achieve organizational objectives.

As bp continues to invest in digital, the change discipline will be critical in putting our internal customers at the centre of change.

Research shows

6x
More likely to achieve project objectives with dedicated change support

Effective change management supports the achievement of desired initiative outcomes and benefits.

5x
More likely to stay on or ahead of schedule with dedicated change support

Dedicated change management improves efficiency of change implementation by minimising resistance and uncertainty.

77%
employees are engaged when they agree there is open communication vs. 1% engagement when they disagree

Communicating the case for change helps maintain customer engagement throughout

143%
ROI when change management is implemented, vs 35% when none

and increases value realisation

Our purpose

Change management value proposition

We partner with delivery teams and squads across Digital who implement changes which impact end users.

We bridge the gap between technology / initiatives teams and end-users by placing the customer at the heart of everything we do.

bphxd design handbook (bpglobal.com)

Increase adoption → Drive engagement and adoption of digital products and platforms as they evolve to meet changing needs.

Enhance productivity → Enhance workplace collaboration, communication, document and content management leveraging digital collaboration tools to empower high performing teams.

Minimize disruption → Reduce business disruption during times of change, to minimize operational risk and 'user downtime'.

Our framework

How we deliver business change management

Our business change management framework comprises 9 artefacts that include activities and tools to support any change initiative.

The framework can be tailored to suit the specific needs of the change initiative.

Click on each change artefact for process guidance and additional detail

Identifies required change artefacts, planning out and monitoring change activities.

Articulates rationale for change and key messages to communication to customers.

Evaluates how stakeholder groups will be impacted by the change (type and scale) to inform change interventions

Clarifies stakeholders impacted by the change and how best to engage them for the duration of the initiative.

Provides a formal framework to plan, structure and manage communications and engagement activity.

Provides a formal framework to assess training requirements and develop training interventions to support the change

Focuses on identifying critical actions needed before a change is implemented to ensure the end-user acceptance

Understanding the effectiveness of change interventions on customers throughout the change journey.

Ensures changes made become the ‘new norm’. The process begins at the start of any change initiative and should be considered past go-live.

Our scope

What we do and don't do

We focus on:

- Business change for digital products

We do not focus on:

- Technical change (i.e., ITIL release management)

*principles from this playbook are applicable to any change initiative

Change planning

✓ Identify change artefacts and plan change interventions to address the identified gaps

x Project plan, resourcing, budgets, product roadmap (PM,PO)

Case for change

✓ Articulate the vision and value drivers to get buy-in

x Define scope, risk and benefit tracking (PM,PO)

Change impact assessment

✓ Map the current and target states to identify people, process, tech and policy gaps

x User research, service design, UI/UX

Stakeholder management strategy

✓ Stakeholder mapping, engagement plan, personas

x Programme governance, project reporting, product councils (PM,PO)

Communications and engagement

✓ Comms strategy, targeted email and Viva Engage campaigns

x Branding compliance, ITK, onebp (C&EA)

Training strategy

✓ Training needs analysis, training plan, user guides, FAQs

x Career development, discipline pathways (P&C)

Business readiness

✓ Ensure user readiness criteria has been met, validate rollback process

x Technical deployment, ELS/hypercare (PM,PO)

Customer feedback

✓ Post-implementation surveys, product feature feedback forms

x Employee engagement surveys (P&C)

Testing

✓ Mobilise early adopters, change networks

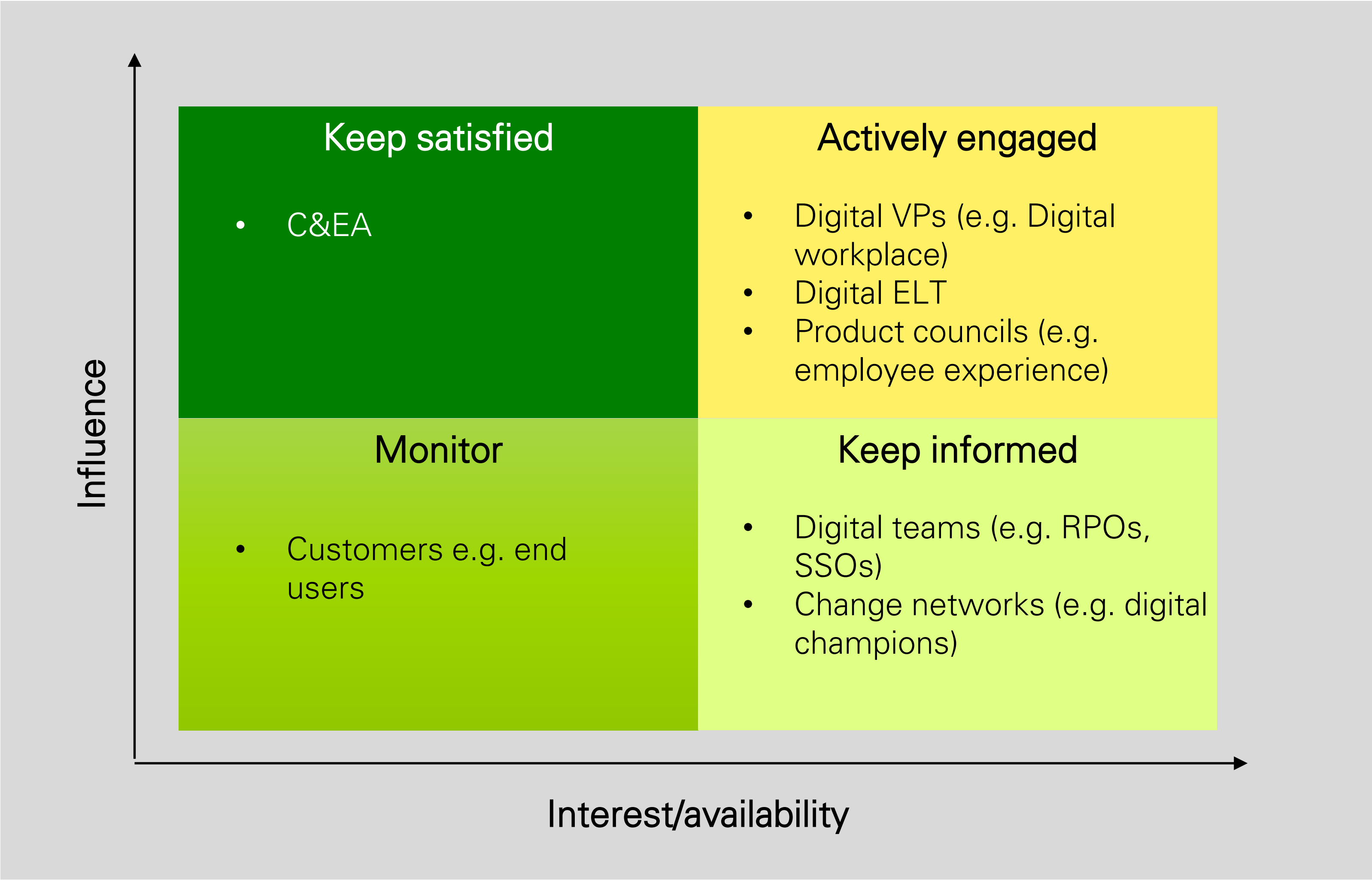
x UAT, functional and performance tests, PEN tests (PM,PO), User design testing

Our key stakeholders

Digital at bp stakeholders

The graph to the right provides an overview of the key stakeholders we typically consider and engage with.

See the Stakeholder management strategy for an overview of stakeholder mapping for change initiatives.



Embarking on a digital change journey

1. Why?

- Get clarity and align on the purpose, vision, outcomes and define the case for change
- Identify key initiative KPIs & OKRs
- Map key stakeholders and understand context of the initiative within Digital and the broader business

- Understand how this initiative aligns to business goals
- Drive clarity and alignment on purpose, outcomes and benefits
- Establish change planning and governance activities

2. Understand the change and its impact

- Establish project governance, roles & responsibilities, and case for change. Then gather key initiative team to assess the impact of change
- Gather high level change impacts across people, process, technology, behavior, & policy
- Validate impact findings with stakeholder groups
- Socialize change impact summary with key initiative stakeholders and agree on interventions

- Mobilize the team including putting change milestones on the overall initiative plan
- Determine intervention approach
- Identify and manage key stakeholders impacted

3. Identify & analyze key initiative stakeholders

Meet with initiative team to capture a list of impacted stakeholders

- Analyze and understand stakeholder needs by mapping on interest vs influence
- Develop stakeholder management plan including interventions and techniques
- Begin to mobilize change network with the support of key stakeholders

4. Create tailored communications approach

- Review stakeholder analysis and clarify the information needs of each group
- Determine communication principles and analyze appropriate channels
- Create communications plan including key messages, aims, objectives, and channels
- Execute communications plan in addition to monitoring success measures, sentiment, feedback, and resistance

5. Build the capability

- Meet with key initiative SMEs to determine training needs of end-users and validate interventions and priorities
- Design, develop, and test training content
- Determine appropriate training delivery approach for each end-user group
- Evaluate training effectiveness

- Refresh key change artefacts as the initiative evolves
- Target hot-spots for interventions for maximum impact
- Ensure communications are impactful, and tailored to audience needs

6. Assess end-user readiness for change

- Review change impact assessment for key readiness activities, interventions, approach, and key timelines
- Develop appropriate readiness assessment
- Monitor readiness of key impacted end-users and regularly present results to initiative leadership
- Confirm readiness acceptance and transition approach

7. Understand and track customer feedback

- Determine principles and approach to tracking customer feedback based on initiative value stream
- Validate assumptions and develop questions (survey or informal)
- Distribute and perform analysis on customer feedback
- Summarize and present results to key initiative stakeholders

- Support transition and handover process
- Conduct lessons learned
- Summarize benefits and KPIs and OKR achievements

"Change planning"

Change planning - overview and approach

Change planning **oversees all change-related activity** including identifying required change components, developing the plan, and monitoring all subsequent change activities.

Inputs
- Project/product plan
- Key stakeholder discussions
- Project/product reporting structure

Informs
- Change strategy*
- Change Plan on a page
- Change governance document*

Key steps	1. Develop change approach/plan	2. Define ways of working	3. Manage and monitor delivery of change activity	4. Handover activity (if required)
Key activities	• Understand initiative purpose and change drivers • Meet with initiative team to understand team scope, initiative timeline and key dependencies • Analyse high level change impacts • Determine change artefacts required to successfully deliver initiatives based on project value stream • Define and agree benefits tracking method to track KPIs & OKRs with the initiative team	• Agree how change practitioners are to report into broader initiative team (key meetings, stakeholders etc) • Define, agree, and establish a governance process throughout the project lifecycles • Clearly define role/responsibilities of change practitioners For larger projects: • Onboard change management resources, including rolling out methodology and tools and templates*	• Ensure cadence of meetings, meeting minutes, agendas, and actions are recorded and documented in a process that is fit for purpose • Track and monitor change activities to ensure tracking to plan • Document any known issues & risks and raise through appropriate initiative governance forums • Monitor project KPI & OKR performance against project aims	• Identify key business personnel receiving handover change management documentation* • Define and deliver key lessons learned to initiative BAU personnel • Develop transition plan to BAU personnel (if applicable) • Summarize achievements and results for KPIs & OKRs
Key outputs	• Change Plan on a Page	• Clearly defined responsibilities (change vs wider initiative team members)	• Change risk/issue register • Up to date change plan on a page	• Change management knowledge transfer approach and plan • Change management lessons learner • KPI/OKR summary

*Recommended for significantly larger change initiatives

Top tips for change planning

When it comes to successful change governance, there are several insights to ensure a smooth project delivery and delivering benefits to our stakeholders and customers within the business.

Define clear roles and responsibilities

Ensure role and scope of change practitioners are defined upfront. This helps to educate broader stakeholders on what change does and doesn't do.

Define change approach and plan upfront

Change artefacts and subsequent activities must be defined up front. Ensure change plan is aligned with broader initiative phases and key milestones.

Socialize approach

Ensure key stakeholders understand change plan and are aware of planned activities. This helps to minimize the risk of un-clear objectives or misalignment with the project team.

Ensure and issues/risks are captured and monitored

Change activities to be regularly monitored ensuring potential delays are proactively managed. If any issues are identified, communicated to broader initiative team to avoid delays.

Plan for handover early

End-users are critical to the success of a change initiative. Identifying business owners to handover change activities to will be important to transition the initiative to business as usual (BAU).

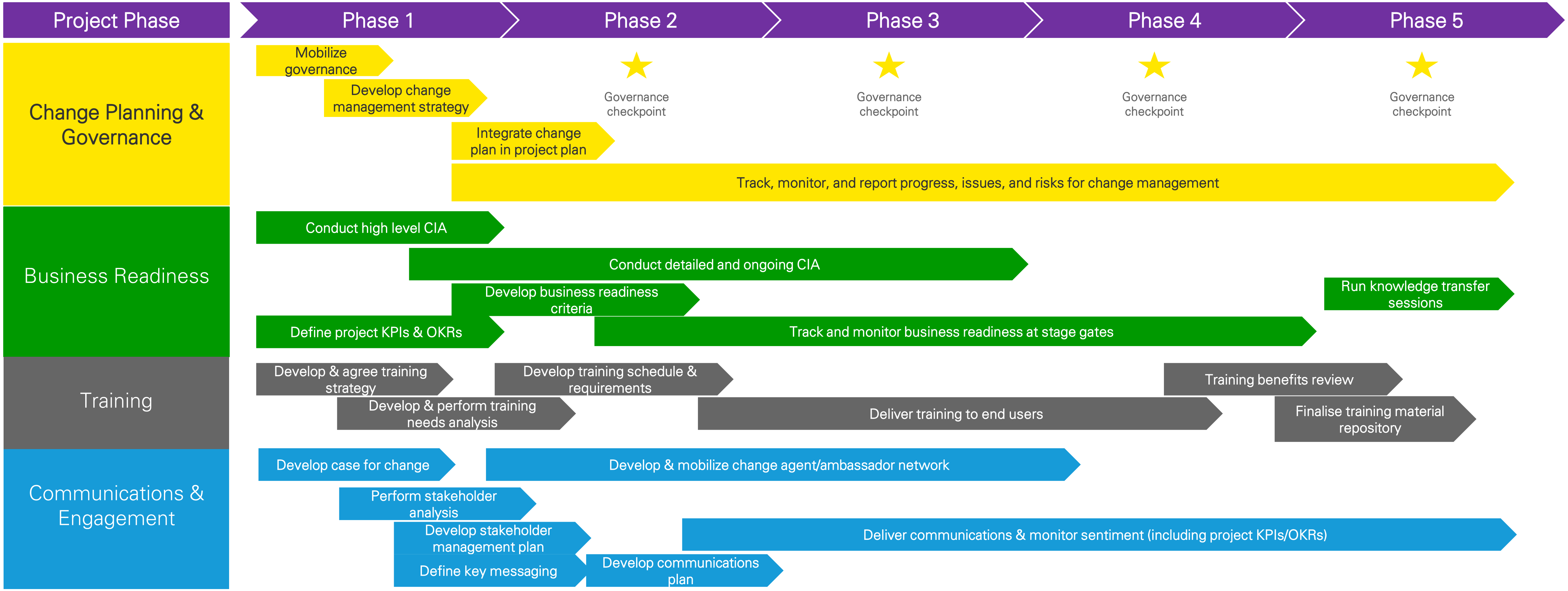
Iterative approach

As the design and delivery of the initiative may be iterative in nature, so too will be the change management approach. Regular checkpoints and feedback mechanisms should be included, and plans updated as needed.

[Click here for a template]

Change plan on a page – example template

Our change plan is an important artefact to summarise the change activities, goals, and timelines. Regardless of the size of an initiative, a change plan should always be created to articulate the key change activities to be delivered, and when. The below change plan is an example of a comprehensive best practice change plan on a page.



“Case for change”

Case for change (CFC) - overview and approach

The case for change articulates the **rationale for the change** and outlines the **change management approach** and activities required to **implement and sustain the change.**

Inputs

- Discussions with key stakeholders and subject matter experts
- Business case
- Financial memorandum

Informs

- Stakeholder management strategy
- Change impact assessment
- Communication and engagement
- Senior leader engagement sessions.

Key steps	1. Review documentation and engage key stakeholders	1A Define value proposition (if required)	2. Develop case for change content	3. Incorporate into communication materials and iterate as initiative progresses

Key activities	• Analyse business case and/or financial memorandum (if exists) to identify key benefits and change drivers
	• Engage key stakeholders to understand components of CFC referenced in next step, including:
	  • Leaders (alignment with broader organisational goals)
	  • Initiative team (initiative goals)
	  • End-users (expectations, fears)
		For each customer segment, identify:
		• **Customer jobs** (what they do)
		• **Customer gains** (benefits required)
		• **Customer pains** (pain points, risks, obstacles)
		From a product perspective, clarify:
		• **Products and services** on offer
		• **Gain creators** (how products create gains for the customer)
		• **Pain relievers** (how products alleviate pain points)
		Align outputs to demonstrate how products can support customers.
		Test proposition with stakeholders and iterate, if required.
			• Develop case for change document, ensuring the following sections are covered:
			  • **Introduction** – what's the big picture?
			  • **What** is changing? (high level)
			  • **Why** is the change happening?
			  • **Who** is impacted by the change?
			  • **How** will users be impacted? (high level)
			  • **When** is the change occurring?
				• Share case for change with key stakeholders to test and confirm messaging
				• Align all subsequent communication materials to key messages developed in CFC
				• Refine components of CFC as required, e.g.
				  • Change in design scope
				  • Change in timeline
				  • Change in expected benefits
				  • Change in target customers

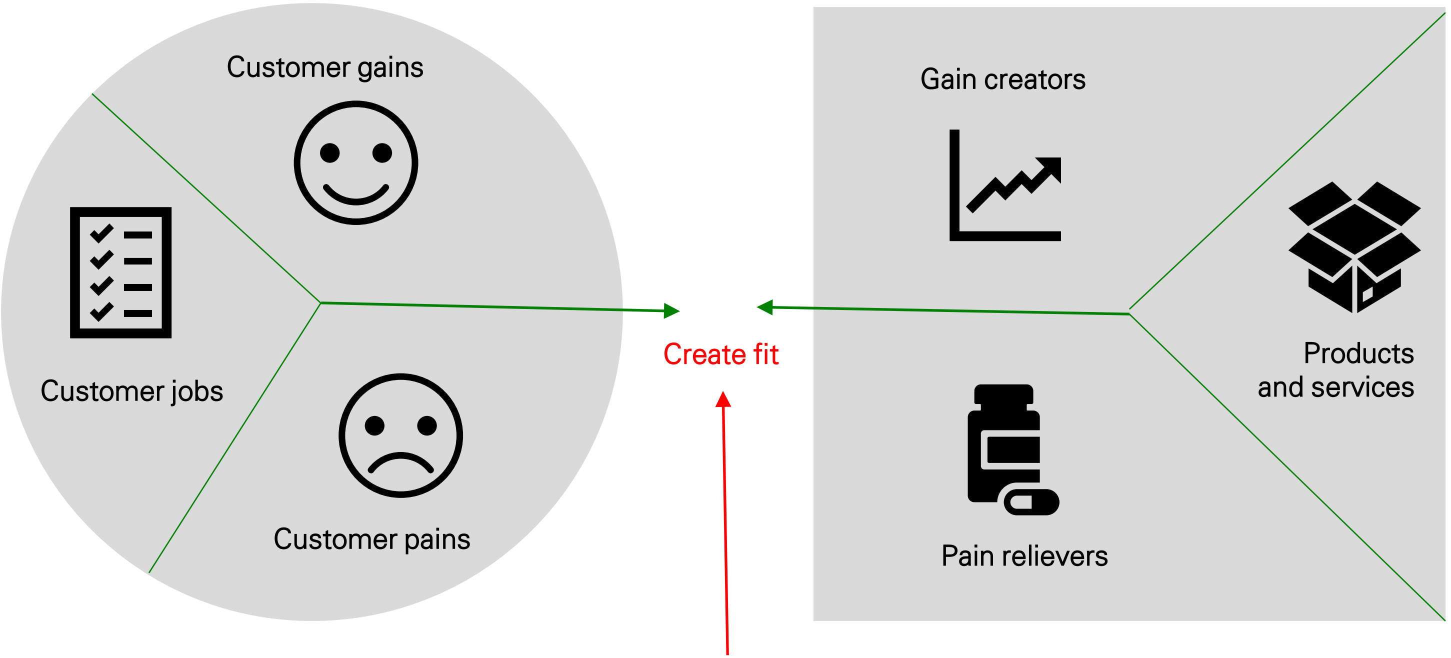
Key outputs	• Stakeholder alignment on information required to develop case for change document	• Clearly defined value proposition statement(s) for each customer segment	• Draft case for change document • Key messages	• Final case for change document

Developing a value proposition

The value proposition describes the benefits customers can expect from our products and services. The proposition is developed by creating alignment between the customer (segment) profile and the product value (proposition) map. Refer to [Mural template]for step-by-step instructions.

The customer (segment) profile describes a specific customer in our business model in a more structured way. It breaks the profile down into:

- **Customer jobs** – describing what our customers are trying to achieve in their work
- **Customer pains** – bad outcomes, risks and obstacles relating to customer jobs
- **Customer gains** – describe the outcomes customers want to achieve or concrete benefits they seeking



The **product value (proposition) map** describes the features of a specific value proposition in your business model in a more detailed way. It breaks down the value proposition into:

- **Products and services** – a list of all products and services on offer to the customer
- **Pain relievers** – which articulate how our products alleviate customer pain points
- **Gain creators** – demonstrate how our products create customer gains.

You achieve **Fit** when your value map meets your customer profile – when our products and services produce pain relievers and gain creators that match one or more of the jobs, pains and gains that are important to the customer.

Understanding the customer (segment) profile

The set of customer **characteristics** that you **assume, observe** and **verify** in the business

Customer jobs

What are they doing?

Customer jobs refer to the activities our customers are trying to achieve. These can be split out into 3 types:

1. **Functional jobs** - customer is trying to perform a task to solve a problem
2. **Social jobs** - customer is trying to look good or gain status
3. **Personal / emotional jobs** - customer is looking to seek an emotional state, such as feeling happy or secure

Job importance
Not all jobs will have the same importance to our customers. Therefore, it is beneficial to scale each job from **Important** to **Insignificant**

Customer gains

What do they want / expect?

Customer gains refers to the outcomes and benefits that our customers want. There are 4 types of customer gains:

1. **Required gains** - Those that are essential for a solution to work. For example, SF should be able to record customer records
2. **Expected gains** - Basic gains we expect from a solution. For example, the UI on a system should be intuitive
3. **Desired gains** - Gains that go beyond what we expect for a solution. For example, system A will integrate with system B
4. **Unexpected gains** - Gains that go beyond customer expectations and desires. For example, before Apple introduced touch screens and app stores to the mainstream, no body thought of them as part of a phone.

Gain relevance
Scale the gains from **Essential** to **Nice to have**

Customer pains

What annoys them?

Elements that annoy our customers when trying to complete a task. Pain also describes risks that can lead to bad outcomes. There are 3 types of customer pain:

1. **Undesired outcomes, problems or characteristics** - Functional problems such as a solution / service / product doesn't work as expected
2. **Obstacles** - Things that prevent customers from getting started on a task
3. **Risks**- Something that could go wrong and create a negative outcome

Pain severity
Scale the pain points from **Severe** to **Moderate**

Defining the value (proposition) map

The set of value proposition **benefits** that are **designed** to attract customers

Products and services

What are we offering?

List of the different products and services available to the customer segment. This can include:

- **Physical / tangible** - manufactured products
- **Intangible** - licensing or customer services
- **Digital** - Online services and digital solutions
- **Financial** - Investment funds, insurance or financing

Products and services
Not all products or services will be relevant to the customer segment so it's important to scale from **Essential** to **Nice to have**

Gain creators

How we create customer gains

How do the products and services create gains for the customer?

Example gain creators include:

- Cost savings that please customers
- Make customers' work life easier
- Increased adoption with customer segment
- Delivering high quality service

Gain relevance
Scale the gain creators from **Essential** to **Nice to have**

Pain relievers

How we alleviate pain points

How our products and services alleviate the pain points experienced by our customers?

Example relievers include:

- Cost savings
- Make customers feel better
- Resolves challenges encountered by customers
- Create process efficiencies

Pain relievers
Scale the pain relievers from **Essential** to **Nice to have**

Developing the product value proposition

Creating the fit between the Customer (Segment) profile and the Product value (proposition) map

Use the example below to shape your value proposition for each segment. Once you are happy with the proposition, test it out with your stakeholders to ensure the language resonates – and be prepared to iterate, based on the feedback.

Our **Products and services** help(s) **Customer segment**

who want to **Customer jobs**

by **Pain relievers** and **Gain creators**

(Verb – by reducing, avoiding)

(Verb – by increasing, enabling)

Case for change framework (1 of 2)

Each case for change will be different depending on the size and complexity of the initiative. The framework below should be used build the key components and articulate the relevant messaging in a logical sequence. Examples available here

Getting started

Key points

- The case for change is created at the beginning of any change initiative
- It is an iterative document and should be updated as the delivery approach, tangible benefits and deliverables evolves
- If the initiative design or deployment schedule changes, you may need to revisit each component listed out here

Introduction

What is the big picture?

What is the problem statement?
e.g. Users spend too much time working across multiple applications to execute a simple business process

What is the proposed solution?
e.g. Optimizing the workflow by modernizing the digital products and platforms

What is the value to bp?
e.g. how does it link to Who we are, Our sustainability frame and aims, How bp intends to be different by 2030 or specific Digital goals and objectives

Think about …the drivers for change (e.g. improving customer experience, increasing velocity, improving digital sustainability etc.)

What

What is changing?

What is the proposed change?
e.g. new product or feature launch, re-designing or upgrading an existing product

What are the benefits of implementing the change?
e.g. new and enhanced functionality, enhanced productivity or process improvements [PULL], mitigating operational risk, cost management or operational efficiencies, [PUSH]

What does success look like?
e.g. what is the target end state?, what are the Key Performance Indicators (KPIs)?

Think about …Tangible benefits and SMART (specific, measurable, achievable, relevant, and time-bound) KPIs that will be measured

Why

Why is it changing?

Why is the change needed?
e.g. new product required to meet evolving business needs, legacy product no longer meeting business needs, inefficient design increasing overheads and impacting productivity

Why are we doing this now?
e.g. product reaching end of serviceable life, synergy with planned platform upgrade or migration

What are the key risks of doing nothing/maintaining the status quo?
e.g. increased cyber risk due to end of serviceable life, increasing costs to run legacy/on-prem solutions, increasing technical debt

Think about … Providing data driven insights (meaningful metrics to drive action and mitigate risks; validate the rationale and benefits with the business case or financial memorandum)

Case for change framework (2 of 2)

Who

Who is impacted?

Who is impacted by the change?
e.g. all SAP end users

What do they need to do?
e.g. all SAP end users need to re-enter credentials after the upgrade

Are changes the same for everyone or split by user?
e.g. Refinery users will have additional new features available to use

Who are the key product and delivery teams involved?
e.g. SAP product team, HCL service desk

Think about …User personas and customer journeys (Refer to your stakeholder analysis to determine impacted users)

How

How will it change?

How will users be impacted by the change?
e.g. there is a new user interface and access to new cloud-based

What are the high-level behavioural, process and technology changes?
e.g. learning how to access, navigate and use the new features, building new APIs

How will deployment be implemented?
e.g. regional or entity specific exceptions will be prioritized for initial deployment

Think about …Mapping current vs future state to identify what will be different. Refer to change impact assessment (if available) but keep the themes high level for this document.

When

When will it happen?

When is the change scheduled?
e.g. 1 July 2023 until 31 December 2023

How will the change be implemented?
e.g. phased deployment or big bang?

When will changes be communicated?
e.g. targeted email campaign to end users one month in advance of go-live

Think about …Early adopters and pilot groups i.e. who can be mobilized early to test the and provide feedback. Change freeze windows or other events during which changes cannot be deployed e.g. Refinery TARs.

Summary

Call to action

What is the call to action?
e.g. leadership buy-in, awareness of the change

Is there a tangible output or action?
e.g. go/no-go decision to mobilize a delivery squad, budget sign-off

What are the next steps?
e.g. follow-up email to confirm the project kick-off

Think about …Providing optionality for decision-making i.e. presenting 2-3 options to achieve the desired outcome by providing flexibility on the approach and evolving business requirements

“Change impact assessment”

Change impact assessment (CIA) - overview and approach

The **change impact assessment** evaluates how stakeholder groups will be impacted by the change, both in terms of **type (people, process, technology and policy)** and **scale (high, medium, low)**

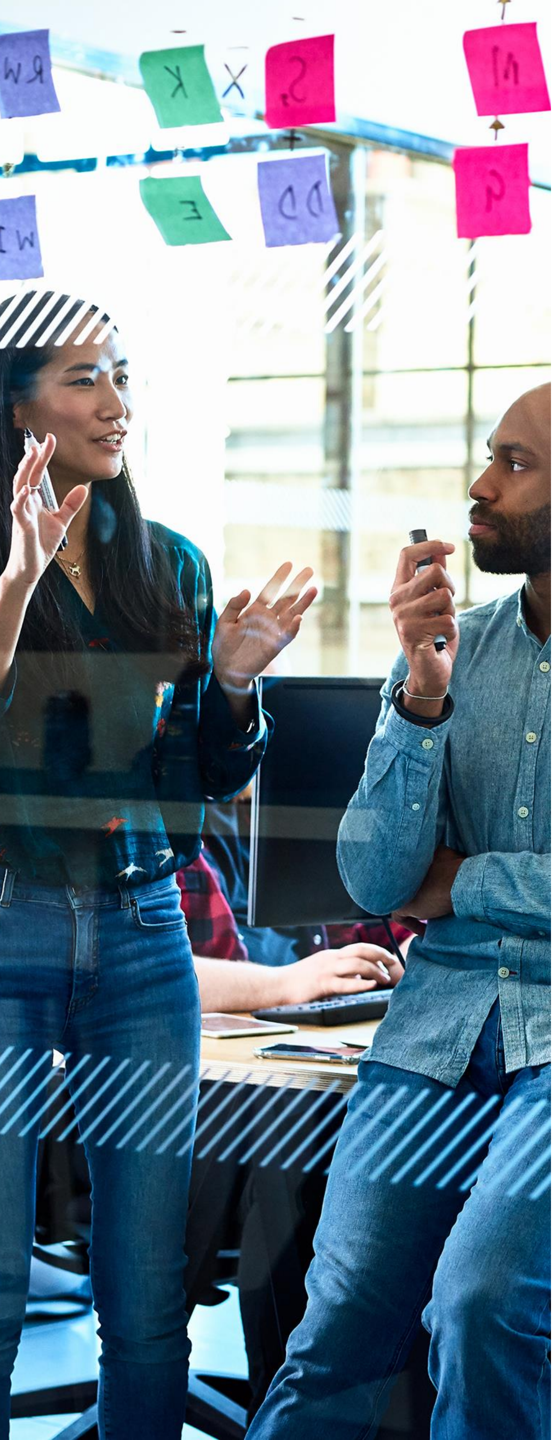
Inputs

- Case for change
- Design documents
- Stakeholder interviews

Informs

- Change plan
- Stakeholder management strategy
- Communications and engagement plan
- Training needs analysis
- Business readiness checklist

Key steps	1. Gather / identify changes	2. Engage to validate changes and impacts	3. Develop CIA summary
Key activities	• Attend workshops / stakeholder interviews • Review documentation (e.g. design documents, business case) • Gather high level changes (people, process, technology and policy) in impact log template • Continue to add changes as initiative design progresses and further detail uncovered	• Validate high level changes with relevant stakeholders (e.g. process owners, initiative team members) • Validate impacts with end-users (e.g. change network) • Continue attending workshops or interviews to capture further changes	• Summarise findings from step 1 and 2 • Validate assessment summaries with relevant initiative team members and end-users
Key outputs	• High level changes • High level impacts and impacted stakeholders • Gaps to be investigated further (via additional workshops, interviews, desktop research)	Change impact template highlighting: • Changes (current vs future state) • Change type (people, process, technology or policy) • Impacted stakeholder(s) • Impact level (low, medium, high) • Recommended change intervention(s)	Change impact assessment including: • Key change themes to incorporate into messaging • Impact summary (segmented as required across process, stakeholders, etc)



Change impact assessment (CIA)

Introduction

What is a CIA?

A change impact assessment (CIA) is the starting point for developing our change plan so that we can actively manage the implications of the project.

It provides a realistic understanding of how the change will impact our stakeholder groups and determines the interventions required to drive and embed the changes.

What is included in the CIA?

The CIA helps clarify how the user will be impacted by the change, including:

1. Current vs future state – by mapping both states you have a clear idea of the gap
2. Impacted users (by type and geography) – helps identify where translation or regional tailoring might be required
3. Type of change – while change impacts can manifest in many ways, they typically fall in one of four categories: people, policy, process, and technology
4. Impact level (high, medium or low) – by classifying the impact level, you can prioritize change interventions
5. Overview of the change interventions required for each change impact

Gathering the change impacts

Options for gathering the information you need

- As a starting point, refer to the case for change to understand the high-level changes that will take place in the project / initiative
- Meet with the project team members and subject matter experts who are knowledgeable about the change
- Refer to specific design documents and deliverables (for example: process flows, job roles designs, technical requirements or specifications etc.)
- Participate in design working sessions as they occur to capture detailed impacts
- Conduct working session(s) with project subject matter experts after design sessions / phase concludes to capture and validate change impacts
- See the next page for suggested questions to use when gathering changes and impacts

Things to remember

There are no silly questions. Subject matter experts (SMEs) will, by default speak in technical language, so don't be afraid to ask questions and really drill down to the change impact

Change impacts are not always static. Projects are often fluid and subject to last minute changes. Conduct periodic catch-ups with SMEs to validate recorded impacts

Always confirm the 'As-is' state. Teams often focus on the future state without considering the 'As-is'. If this isn't mentioned in meetings, be sure to ask.

Questions to consider when assessing change impacts

People	Process	Technology	Policy
Behavioural / Cultural changes • Is a mindset change required? • How will those involved in this change be expected to behave differently? • How would you describe the culture? • Would the culture need to be different in the future to make the change possible? • Will there be a significant / some / minor / no change to the way the business / team currently works? **Capability Changes:** • What type of skills and competencies will be required to perform in the future state? • To what extent are those skills / competencies currently available within the business? **Structural Changes:** • Will there need to be changes to current roles or will new roles need to be created to support the change? • Will reporting lines need to shift? • Should certain functions or tasks move to different teams? • Do KPIs and other performance metrics need to be changed or introduced to support the change? • Are there any anticipated FTE reductions expected? When would these people leave their roles?	• Are there any changes to who performs specific process steps from where they are currently performed? • Are we anticipating that new processes will need to be developed or current processes to be updated? • Will any processes be automated? • Will there be a need for interim processes?	• Will there be new systems being developed and implemented? Which systems will they be replacing? • Will new technologies be introduced? Are they similar or vastly different to what is being used now? • Will current systems be upgraded or refreshed? • Will changes impact people's online delegations, access or security profiles?	• Will there be a change to bp policies (HR, Legal, Finance)? • Are policy changes global or country / region specific? • What documentation needs to change as a result of the policy change?

Gathering the change impacts
Options for gathering the information you need

Recording the change impacts

An Excel template is used to capture the current and future state impacts as well as interventions to drive and embed the changes.

Change impact reporting / engagement

Sometimes you may be asked to report on change impacts – either as part of stakeholder engagement sessions or senior leader / sponsor reporting. In these cases, a condensed version of the CIA can be used in a one pager (see next slide)

Change impact assessment summary

[Change impact summary template]

1. Executive summary	
Overview	Insert change summary – e.g. Initiative X is introducing System Y to support strategic aim Z (Tip: case for change can inform)
Expected Benefits	Insert summary – e.g. System Y will lower operating costs and create a better user experience for Groups A and B (Tip: case for change can inform)
Risks	Insert identified risks (if known)

2. What will be impacted by the change(s)?			3. Which stakeholders are impacted by the change(s)?						
Type of Change	Description	Impact Level	Service owner	HCL	RPO / SSO	End users			
People	e.g. Create Account form has been updated on myIT to improve user experience and reduce the number of E5 licenses being created								
Process	Insert description								
Technology	Insert description								
Legal / Regulatory	Insert description								

Key: **High** **Medium** **Low**

“

Stakeholder management strategy

”

Stakeholder management strategy - overview and approach

The **stakeholder management strategy** clarifies the **stakeholder groups** and **individuals impacted** by the change and **how best to engage them** for the duration of the initiative.

Inputs

- Workshop with initiative team to identify key stakeholders (individuals) and stakeholder groups
- Organization charts
- Case for change
- Change impact assessment

Informs

- Communications and engagement plan
- Change Network
- Business Readiness
- Customer feedback

Key steps	1. Identify stakeholders (groups and individuals)	2. Analyse and understand stakeholders	3. Develop stakeholder management plan	4. Deliver and monitor stakeholder management activities

Key activities	• Conduct desktop review to understand stakeholders
	• Meet with initiative team members and business stakeholders to further understand stakeholder landscape. Consider
	  • Who will be impacted?
	  • Who is required to support the change
	  • Who is required to deliver the change
	• Capture list of key stakeholders
		Map out stakeholders
		• For stakeholder groups - Plot stakeholder groups on a 2x2 grid (Influence vs interest) in order to prioritize engagement.
		• For key stakeholders (individuals) - plot on a 3x5 grid (influence vs interest) and map current state vs. desired state.
		Note: consider who has access to stakeholder analysis, given sensitive nature of content
			• Develop stakeholder management plan for groups and key individuals. Include:
			  • Process and frequency for tracking stakeholder support
			  • Suggested interventions, techniques and activities
			  • Role and responsibilities for tracking
			• Mobilise change network with key stakeholders identified in step 1
				• Execute stakeholder management activities
				• Monitor stakeholder engagement levels, identify any concerns.
				• Leverage change network feedback
				• Regularly review stakeholder analysis to identify changes to:
				  • Stakeholder list
				  • Messaging
				  • Engagement strategies

Key outputs	• List of key stakeholders (individuals and groups)	• Stakeholder analysis / prioritization (individuals and groups) • Stakeholder register spreadsheet	• Stakeholder management plan • Established change network	• Stakeholder tracking

Stakeholder identification

Stakeholder engagement is crucial to change management.

This diagram provides an overview of the core stakeholders that are typically engaged for enterprise changes.

How to identify stakeholders

All project members should be invited to contribute their stakeholder lists making sure no one is missed or forgotten e.g. service owner, myIT staff, end users, line manager, investors

Next steps

Once stakeholders have been identified, consider the level of engagement required for each stakeholder group and/or key stakeholders (individuals).

May impact bp policy and may require updating

- Legal / legal hold
- Tax
- Procurement
- Digital Security

Leaders / Initiative Sponsors

Core stakeholder groups – must be informed of any change

- Regional Portfolio Owners (RPO) / Site Service Owners (SSO) / Service Owner
- Support services (HCL service desk, myIT bars, field services)
- Impacted business users

Enablers – may have different business impacts

- Legal
- People and Culture
- Communications and Advocacy
- Finance

Integrators – may have different business impacts

- Trading and shipping
- Regions, cities and solutions
- Strategy and sustainability

Wider stakeholder groups – may be informed / involved based on change impact assessment

Mapping stakeholder groups to prioritize engagement

Power / influence ↑

Influential observers: Keep satisfied Have sufficient engagement to ensure their voices are being heard on key issues. Avoid low value contact so that they do not lose interest in the proposed change / initiative.	**Key players: Engage closely** Strong buy-in required from these stakeholders – fully engage and make the greatest effort to satisfy their concerns and requirements for information.
Spectators: Monitor Monitor this group in case they move to another category. Keep them informed but do not overload them with excessive communication.	**Active players: Keep informed** Keep this group regularly informed, especially at planning and information gathering stages to make sure no major issues arise and to give them opportunities to contribute. This group can be very helpful with the detail of your initiative.

Interest in your change →

How to map stakeholder groups

- Map stakeholder groups into quadrants based on their power/influence over the change vs their interest in the change.
- This feeds into the communications and engagement process as it determines the prioritization of stakeholders to be engaged – how much engagement, communication and consideration they need.

Mobilising key stakeholders (individuals)

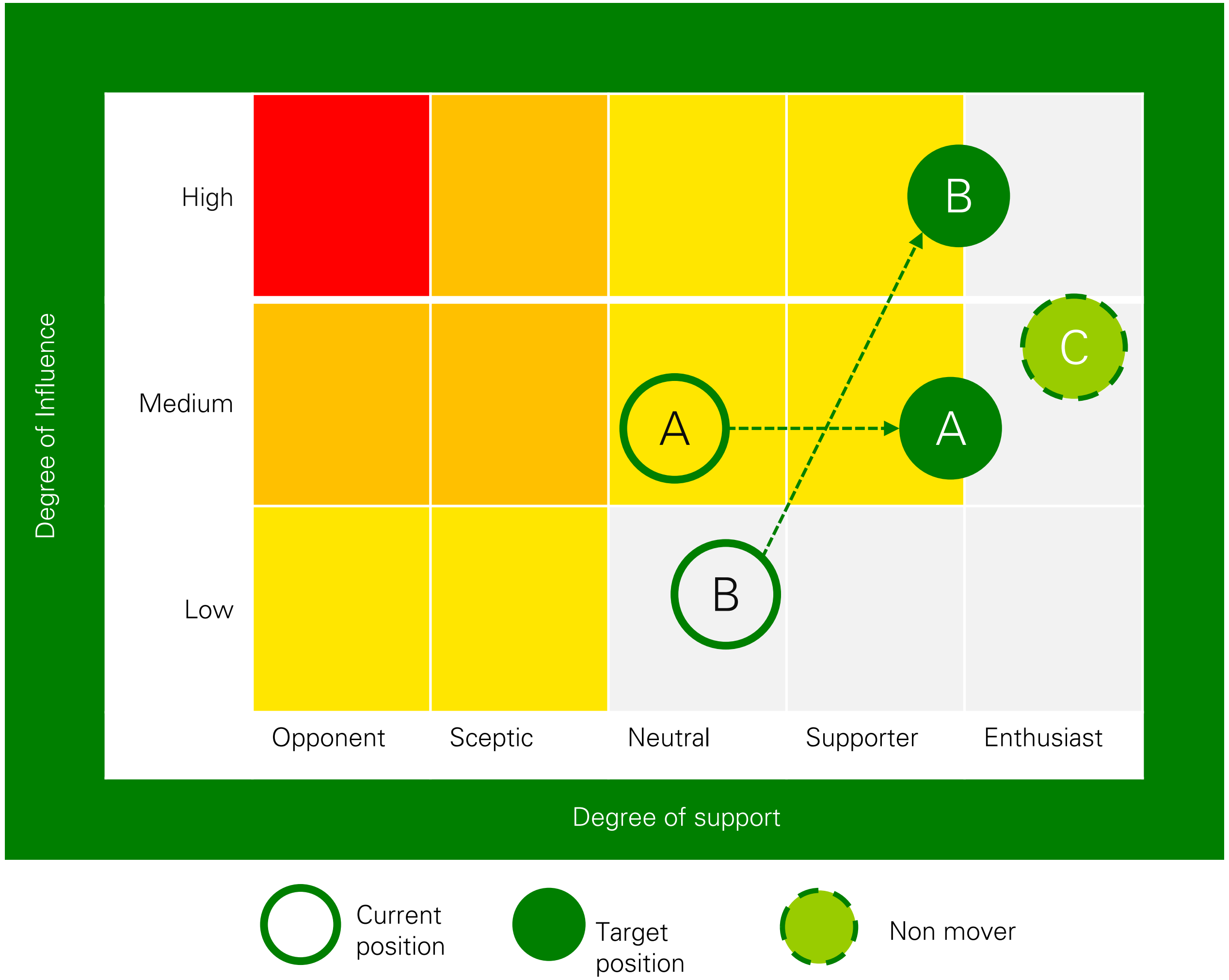
Not all stakeholders start their journey in the same place – some may demonstrate hesitance or even resistance.

When dealing with key stakeholders it is better to map individuals based on their level of influence and perceived degree of support for the change.

Think about **where they are** on the matrix and **where you want them to be.** For example, a key stakeholder may passively accept the change, but you need them to become an enthusiast as they hold a strong power within the organisation and are capable of influencing others.

The mapping exercise will inform the engagement activities required to transition the individual from one state to another. These activities can be tracked in a stakeholder register.

Please note – ensure this document is maintained securely as mapping may be considered sensitive.



Guidelines for mapping key stakeholders (individuals)

Level of Influence: The level of power and influence the stakeholder has over the success of the change effort		
Low	Medium	High
• Has little or no influence over the success of the change. • Is not / does not need to be involved with critical decisions	• Has limited influence over the change (e.g. some control over resources) • May not be a decision maker but likely consulted as part of the decision-making process. • Has skills helpful to the change or has contacts who will be of use. • Responsible for employees and managers affected by the change.	• Key influencer over the success of the change - either as a decision maker, or a key influencer of major decisions. • Controls resources vital to the change • Has a high degree of credibility with peer groups / leaders OR is responsible for large numbers of employees / managers who will be affected

Degree of Support: The degree to which a stakeholder currently supports the change or the degree at which support is desired				
Opponent / Challenger	Sceptic	Neutral	Supporter	Enthusiast
• Unconvinced of the need for the change or its benefits. • Unwilling to allocate resources and personal time • Resistance shown to previous change initiatives • Does not recognise the benefits of the initiative and is not committed to delivering them	• Has reservations about the change but not enough to put them in the 'opponent' category. • May say some negative things about the initiative to peers and it may be difficult to get their attention • Will allocate resources but will not treat the change as a priority • Passively accepts the change • Not convinced of the benefits at this time	• Has a neutral perspective in terms of the overall change and its benefits; this may be as a result of not knowing enough information to be able to form an opinion. • Will allocate resources but will not treat the change as a priority • Passively accepts the change	• Understands the need for change and the associated benefits. • Actively participates in activities but not quite at the stage of 'enthusiast' in terms of proactively persuading peers of the benefits. • Willing to participate in activities and provide suitable resource • Actively supports the change.	• Openly persuades peers of the positive benefits of the initiative and proactively interested in updates. • Willing to allocate quality resources and personal time in line with initiative needs • Actively supports and will advocate for the change to those with low levels of support • Bought into, and is committed to, delivering the change

Influencing strategies

How to influence an individual (and move them from neutral to enthusiast)

1. Listen and be empathetic

- Show an interest in people's feelings – ask questions to understand how they perceive the change, their concerns, needs and interests.
- Meaningful conversations will break down barriers and make people feel involved in the decisions being made
- If you listen to people's opinions first, they will be more likely to listen and respect what you have to say. In turn, get on board with the change

2. Demonstrate early success and wins

- Show something (doesn't need to be the finished product) - this helps people visualise the change and have a better understanding of what to expect in the future. If they can visualise it, then they can speak about and understand it. E.g. Prototype of myIT portal
- Share success stories early to create (and maintain) a buzz. This helps convince those who are sceptical of the change

3. Collaboration

- Give people an active part to play in the change (champions, early adopters etc) – people are more likely to get involved when they feel they have had some influence/control over the change
- Create discussions, listen, seek input

4. Weakening resistance

- Use rewards or punishments to encourage people to respond in a certain way i.e carrot method where there is an incentive to respond to the change
- Reduce resistance by giving people more control and an opportunity to grow

5. Conversations

- Simple but powerful – can discuss far more in a conversation than a planned presentation
- Can identify where they are now and guide them to desired outcome

Stakeholder engagement

Why stakeholder engagement is important

Stakeholder engagement helps organizations to proactively consider the needs and desires of anyone who has a stake in their organization, which can foster connections, trust, confidence, and buy-in for your organization's key initiatives

Key engagement principles

Begin conversations early
Stakeholders should hear the message from an official source, rather than rumours.

Communicate often and clearly
Establish a regular cadence of communication – avoid jargon and simplify complex messages using Smart Brevity

Be open and honest
Address stakeholder expectations and manage whatever concerns they might have

Establish a feedback loop
Establish a mechanism to gather feedback and demonstrate where feedback has been acted on

Involve rather than inform
Collaborate and co-create with your stakeholders

Be inclusive
Understand the cultural or linguistic diversity, how different stakeholders understand and process information

	Informed	Consulted	Involved	Collaborative	Empowered
What	Receive easy to understand, objective and balanced information	Provide feedback on progress, analysis, outcomes and next steps	Work closely throughout the project to ensure perspectives are captured and understood	Engage in each aspect of project activity	Take on final decision making responsibilities
How	• Plain language summary • Infographic	• 1-2-1 interviews • Surveys • Focus groups • Workshops	• Working group • Regular meetings	• Advisory committee • Decision making	Delegated decision

Understanding your stakeholders with Empathy mapping

What is empathy mapping?

Empathy mapping is a tool that helps you understand what your users/stakeholders think, feel, say and do.

It will help you create a shared understanding of user needs and aid decision making.

For process guidance, please contact the bp service design team.

Says

- What does your user say?
- What are some quotes or words they use?
- What do they say in public??

Think

- What is the user actually thinking?
- What bothers them?
- What matters to them?

Does

- What does your user do?
- What actions do they take?
- What’s their attitude towards others?

Feels

- What worries your user?
- What do they feel excited about?
- Which emotions are they feeling?

Change network

Establishing a global network to embed changes locally

What is a change network?

A virtual network of regional representatives who serve as a conduit between a programme / product and their respective regions or countries. They provide the vehicle for engagement, influence and insight, alongside the horsepower to embed initiatives within the organization.

How do they support success?

Support the initiative team by:

- Act as a conduit between the programme / product and the business
- Provide input into change & comms activities
- Supporting roll-out of comms and training
- Triage questions: direct people to support resource

Support the business / customers by:

- Being a trusted advisor and point of contact for queries.
- Representing best interests of end-users
- Advising on messaging that is relevant to the needs and experience of the end user
- Setting expectations for key milestones

What are the benefits?

- ✓ Business ownership - Change is more successful when it is owned and driven from within the business
- ✓ Continuous two-way feedback - Allows the initiative team to refine activities and re-prioritize efforts where needed
- ✓ Direct insights - Change agents offer rich insights from on the ground and promote understanding and commitment
- ✓ Strong relationships - Fostering early interactions with the business through the Network will help build strong relationships

Change network

Change network objective and activities interlink across key areas of change management scope.

	Communications & engagement	Training	Business readiness
Objectives	• Ensure that everyone impacted by the change is aware and understands what the changes are and what it will mean for their role	• Ensure that all impacted customer groups receive relevant, timely and sufficient training and education to enable them to perform their role when the change takes effect	• Ensure that everyone is ready, willing and able to adopt the new changes • Inform the change team of any customer concerns so they can be addressed
Change Agent Activities	• Inform their colleagues/other customers of upcoming changes, what they will need to do differently and the rationale and benefits of the program	• Share the training session scheduling and content with their team(s) • Review training content prior to delivery (if required)	• Engage their team(s) to understand their preparedness for the change and any concerns that they have so that they can feed back to the Change team to address
Outcomes	✓ Key messages given to end users ✓ There is clear understanding of the change/initiatives, objectives and benefits ✓ Everyone knows what is changing and how it will impact their day-to-day	✓ Impacted customers know what training they need to complete and when they can attend sessions ✓ Customers know where they can go to self-serve training materials on an ongoing basis	✓ Customer buy-in fostered by seeing that their concerns are heard and acted upon ✓ Everyone is prepared and committed to adopt the change when it takes effect

Mobilizing a change network for Enterprise

Establishing and managing the network

Engage the Regional Portfolio Owners (RPOs) at the beginning of the initiative and request that they nominate candidates from their regions.

Let the RPOs speak to the individuals before you engage them to ensure they are happy to participate. This also avoids confusion from the outset.

Once agreed, schedule engagement sessions with the group:

- Always start with a kick-off session to introduce the initiative and explain roles and responsibilities of the network.
- Ensure a regular cadence of engagement – Frequency can be scaled up and down in line with initiative milestones or requirements.
- Develop a calendar of topics to ensure engagement sessions follow a structure. However, be prepared to be flexible with topics, in case of initiative delays.
- Establish a collaboration space (ideally in Teams) where documents can be shared, and questions asked.

Mobilization session – sample agenda

Agenda Item	Top Tips
1. Welcome and session objectives	• Involve initiative team or business leaders in the kick-off session (if possible). Support from leadership is key to the success of change networks
2. Initiative X overview	• Provide programme materials and resources (i.e. briefing decks) so change network can deliver messages to peers and leadership
3. Overview of change approach	• Providing a brief overview of the change plan/approach to align the change capability in the network
4. Change champion objectives and responsibilities	• Clearly define roles and set expectations amongst the network
5. Next steps	• Outline any upcoming meetings and the immediate actions required. Emphasize that success will rely on their attendance and understanding of their role

Role of a change agent template

Expectations

Objectives

- Represent the project objectives, benefits, timeline, and resources to their respective team(s)
- Represent the needs of their respective team(s) to the project team

Responsibilities

- Participate in insert frequency change network meetings
- Participate in change impact analysis
- Provide input into and review function / BU specific talking points, FAQs, quick reference guides, and other support resources
- Participate in system testing
- Provide input into training content development; some Change Champion may be asked to become trainers
- Provide day-of and post-go live support for their respective team(s)

Time Commitment

- Average X hours per month from XX-XX
- Time commitment per month will vary based on project milestones

Characteristics

- Be well respected by their colleagues within the group(s) they represent
- Understand the needs and cultural norms of the group(s) they represent
- Represent each stakeholder group; a mix of advocates and skeptics
- Be open to exploring potentially uncomfortable ideas
- Have familiarity with the current state
- Have the bandwidth to participate in Change Champion Network meetings and other activities defined by the project team

“Communications and engagement”

Communications and engagement – overview and approach

The **communications and engagement approach** provides a formal framework to plan, structure and manage communications and engagement activity.

Inputs

- For smaller tasks: inputs will be driven by the demand form
- For larger tasks (associated with bigger initiatives)
  - Case from change
  - Change impact assessment
  - Stakeholder mapping and prioritization
  - Initiative Plan

Informs

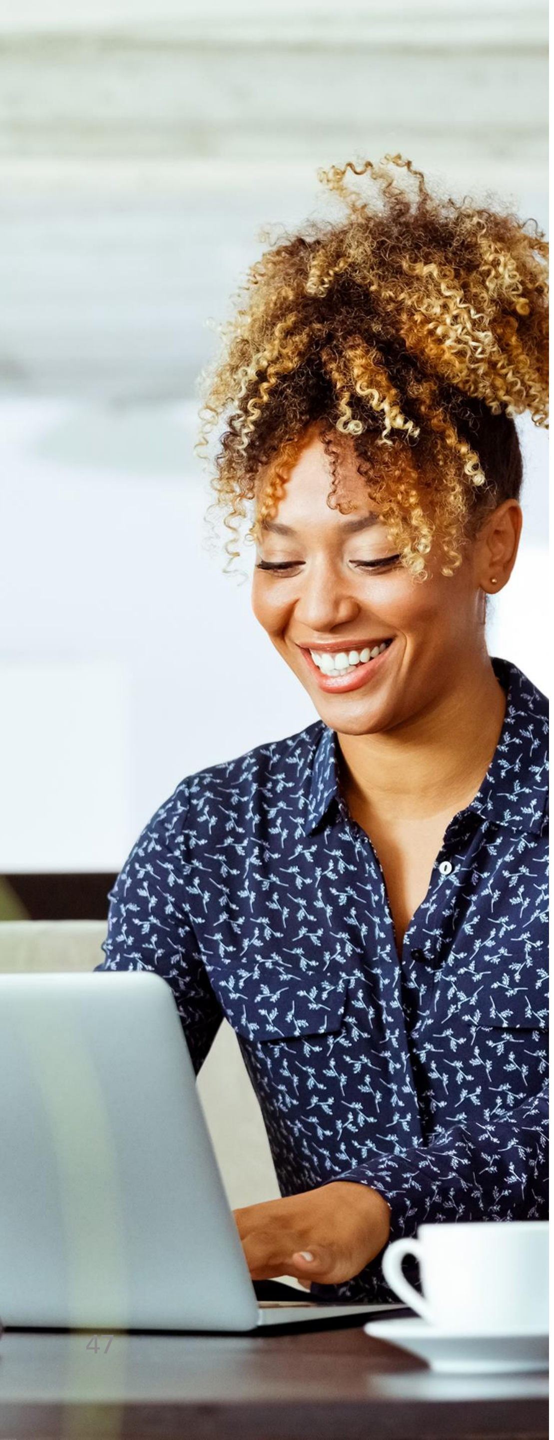
- Provides a framework to structure and manage activity
- Key tactical activities to support the change.
- Business Readiness checklist, prior to go live

Key steps	1. Review stakeholder analysis	2. Develop communications approach	3. Create communications plan	4. Deliver communications

Key activities	• Refer to stakeholder analysis / mapping to gather insights and understand stakeholder groupings
	• Clarify information needs of each stakeholder group
	• Confirm information required from each group and initial interventions considered to build desire/commitment
		• Determine guiding principles for communication and engagement activity
		• Understand the current communication channel landscape and what channels are most appropriate per stakeholder group
		• Define and agree communications approvals model (if needed)
			• Create plan, considering:
			  • Objectives
			  • Audience
			  • Key messages
			  • Channels
			  • Timing
			• Create communications materials to bring to life key messages and move end-users along the change journey
			Note: tailor communications in-line with phase of end-user change journey
				• Execute communications as per plan
				• Update the communications & engagement plan in alignment with the evolving initiative delivery
				• Monitor, measure and evaluate communications impact and effectiveness (also monitor communications impact vs product KPIs & OKRs)
				Note: Refer to Customer Feedback section for guidance on evaluation

Key outputs	• Audience Insights, including
	  • Needs
	  • Current level of awareness
	  • Desired level of awareness
		• Communications and engagement principles
		• Channel analysis
		• Communications approval matrix (if needed)
			• Communications plan
			• Communications material
				• Updated communications plan (if needed)

"Demand management"



Managing our demand

Communications request process

Managing demand

- To streamline our workflow, prioritise our demand and optimise our processes, we have developed a communications demand form that is linked to a planner.

How it works

- The user makes a request through the Microsoft form. This is then automatically logged into Microsoft planner and reviewed by one of the communications leads.
- If further information is required, a member of team will reach out to the requester for clarity.
- If you receive a request for communications support via email, Teams or in person, simply point the individual to the new forms.
- The development and implementation of the communications will be processed in the normal way.

Communications approach

Communications and engagement approach
Adapting the ADKAR methodology

There are distinct stages of knowledge and readiness that individuals progress through, during any change initiative. We recommend adapting the ADKAR framework to structure broader communications campaigns. These can be scaled up and down based on the requirements of the initiative.

Awareness	Desire	Knowledge	Ability	Reinforcement
• Understand need for change • Understand the nature of the change	• Support the change • Participate and engage	• How to change • Implement new skills and behaviours	• Implement the change • Demonstrate performance	• Sustain the change • Build a culture and competence around change
• Announce the change well ahead of time • Explain case for change • Give impacted stakeholders opportunity to ask questions and make suggestions	• Communicate benefits • Gauge reactions to the change • Identify champions • Identify risks • Address concerns or show how the change benefits them personally *(what's in it for me?)*	• Communicate training facilities available and provide coaching if required. • Signpost resources for post go live support / reference	• Support scheduled practice runs before the change is fully implemented • Monitor change and adjust communications interventions if necessary	• Communicate any known problems and solutions • Reinforce the change by using positive feedback / recognition / success stories – to help employees adopt and embed the change

Understanding the audience

Refer to stakeholder analysis/mapping for more detail

What do they need to know?

- It is likely that stakeholders will have different information needs. Consider how they are impacted and where they are in terms of awareness/understanding
- Compare what they need to know – can communications be similar or should they need to be tailored to each

What do you want from them?

- Consider what is required form each stakeholder in terms of behaviour, attitude and perceptions.
- Some groups may need specific details of actions required (e.g. Share information locally)

Cadence of communication?

- Refer to the stakeholder mapping exercise – the frequency of messaging is likely to be greater for those who need to be actively engaged or kept satisfied compared to those who need to be informed or monitored

"Planning"

Communications plan

Key ingredients to help you manage your communications activity

Objectives

- What is the objective of each message?
- Is there action required for audience groups?

Audience

- Who are the different audiences for each message type?
- Are translations required? We translate into 8 languages – Spanish, French, German, Dutch, Polish, Indonesian, Portuguese and Spanish

Key messages

- What are the key messages to deliver to each audience?
- What is the outcome of message delivery?

Channels

- Which channels will each message be delivered in for each audience?
- What will that message look like, written, video, presentation etc?

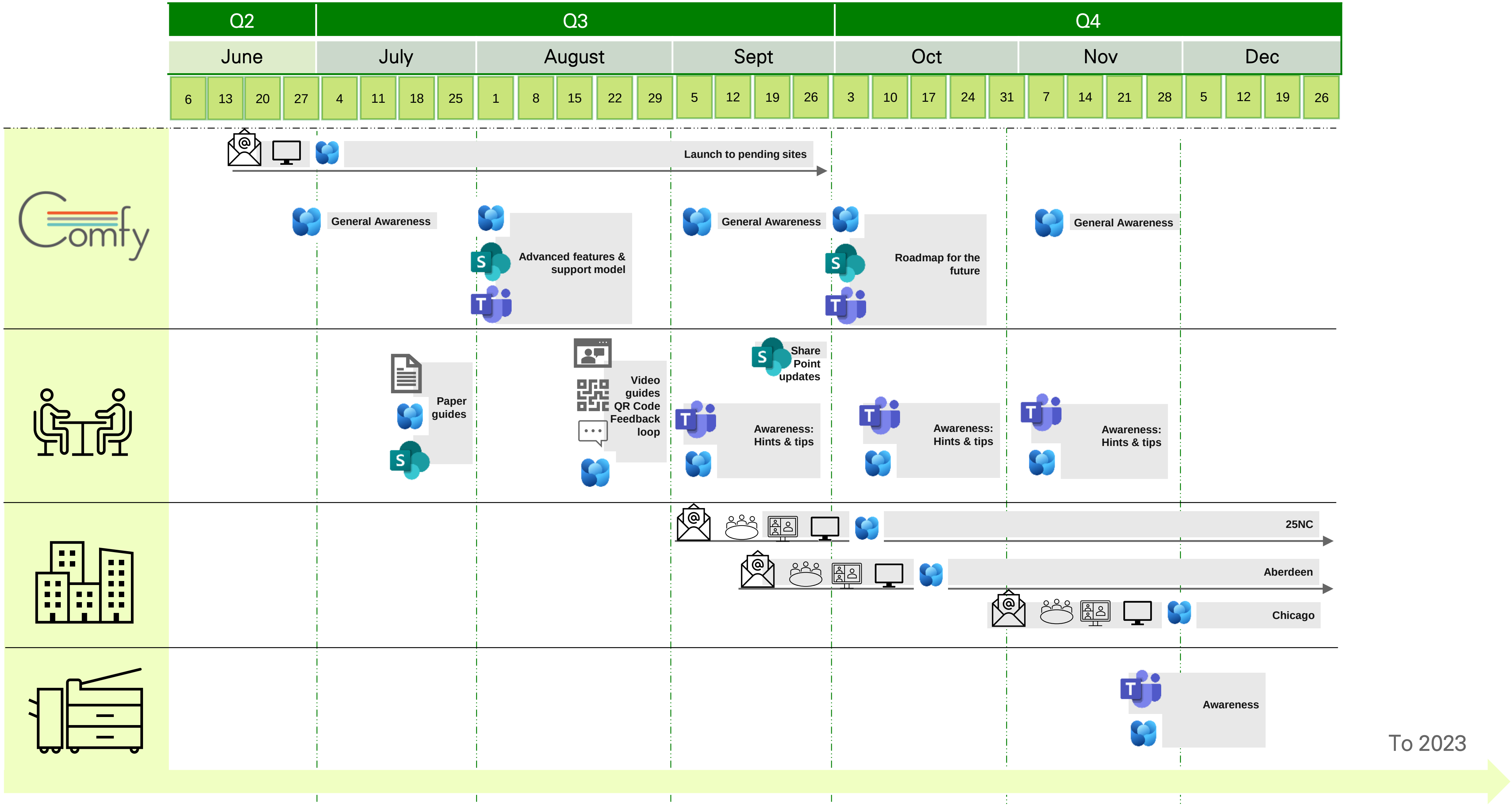
Timing

- When is it being delivered?
- Over what timeframe?
- Are there multiple messages/same message multiple times?

[Communications plan template]

[Example communications plan]

Communications plan on a page example



“Campaign management”

Overview of communication channels in bp

What's available to you

Teams
Audience: targeted

When: awareness

Posters
Where: high traffic areas

Audience: global / site specific

When: low impact, awareness/action

Email / Newsletters
Audience: targeted

When: impact to working or action required

Onebp (inc. Viva Engage)
Audience: anyone in bp

When: high impact with global messaging

NB – Managed by Jeanette Dabhoul (C&A)

Change networks
Audience: regional or product specific

When: messaging requires cascade or explanation

Viva Engage
Audience: global

When: awareness

Digital signage
Where: high traffic areas,

Audience: global / site specific

When: low impact, awareness/action

Stream
Audience: global

When: awareness, 'talking head', concept explanation, process steps (if static)

myIT service alerts
Audience: global / site specific

When: high impact disruption to services

NB – Managed by HCL

Communities of practice
Audience: targeted

When: collaboration on products or processes

Writing guidelines
Being heard in a cluttered distracted world

The challenge

We are often overwhelmed by the volume of content available to us each day.

As a result, our attention spans are shorter which impacts the way we consume content.

Research shows

- People rarely read more than a few paragraphs
- They have high expectations for the time they give you
- They want to know what's new and why it matters

Smart Brevity is distilling news down to the core items of what's new and why it matters.

Think of the texts you send, the social media posts you share. They're all short, sharp and to the point.

We need to write like this too, or we'll seem totally out of sync with the real world.

Audience First

Everything you do should be a service to the reader.

Write for the smart lay person in a way that will inform and equip them to do their job better.

Does the content make the reader smarter? If not, better to leave it out.

Hone your voice

- Write like an expert – be an informed guide
- Write how you speak – not a journalist or academic
- Be authentic, assertive and accessible

Ideal content

Explain why something matters with authority, and only include what's authentically new and significant.

When you write, ask yourself: **Would YOU read this?**

Keeping editing

- Cut every unnecessary word
- Use bullet points
- Use bolding
- Use vivid words that capture attention

Writing emails

What to use and when

When to send an email communication

- Send a medium priority communication when they need to act by a specific date OR a planned outage will impact them
- Send a high priority communication when there is an unplanned outage or service disruption that has an impact on their way of working OR there is an impact to their access to core sites/apps

Things to consider

- Send from recognised mailbox (not a personal mailbox) – make sure mailbox has permission to send to distribution lists
- Consider the efficiency of automated emails
- Confirm accurate data to ensure your message is correctly targeted
- Refer to [mailbox guidelines] when sending
- Use the correct [colour palette]
- Follow [bp writing style] guidelines
- Don’t use red text or highlighting
- Emails from group mailboxes have a relatively low open rate of between 10 -30%

Digital Enterprise (DE) emails

- When an action is required
- Raising awareness to the DE community on key initiatives. In this scenario, consider if email is the correct channel and if Viva Engage / Teams might be better.

Medium priority communication

- When an action is required by a specific date (e.g. license renewal or software removal)
- When a planned outage will impact a customer's access to applications or sites

High priority communication

Unplanned outage or service disruption that directly impacts the customer’s ability to:

- Carry out normal work tasks
- Access core applications or sites

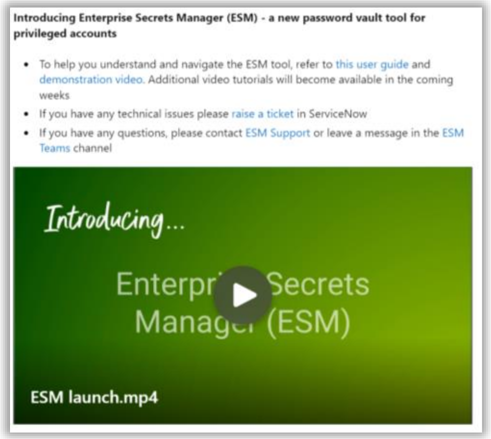
Viva Engage posts
What to use and when

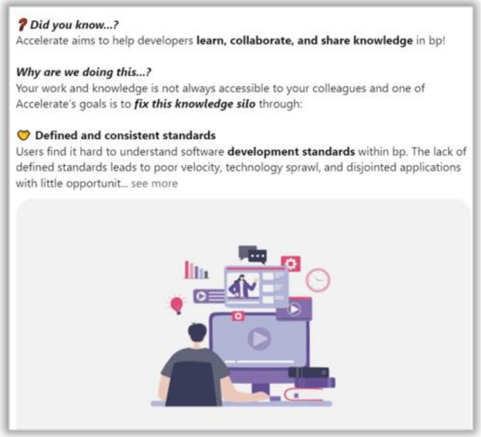
When to use Viva Engage

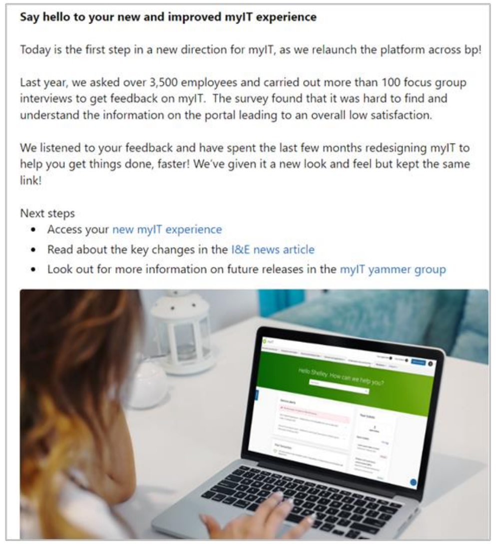
- When a change impacts a large audience
- To support an email communications or when an email is not suitable
- To highlight calendar invites for events

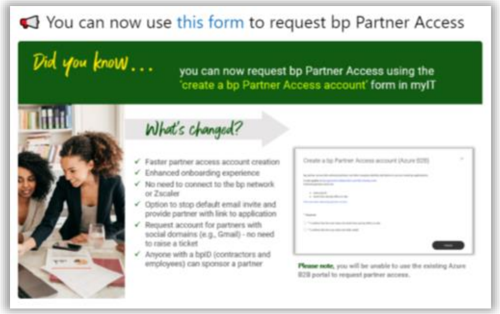
Things to consider

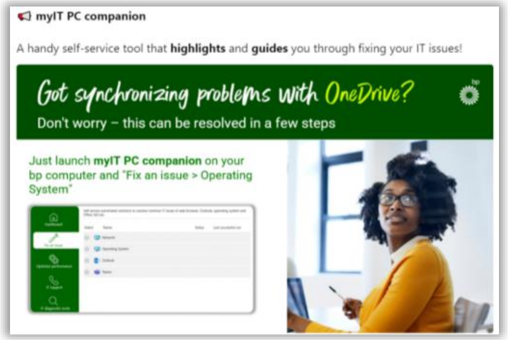
- Subject line should attract interest
- Simplify messages using Smart Brevity and keep posts short
- Use a series of posts to build a story (campaign vs. one time approach)
- Create impact using Microsoft stock images, bp image shop, Viva Engage Gifs and Giphy. **Do not** use Google images!
- Consider PowerPoint to create animated gifs with tailored bp messaging and design.
- Encourage product owners / key SMEs to post directly or request to post (as them) on their behalf. If neither option is available, ensure SMEs are tagged for accurate and timely responses.
- Ensure support services have been engaged as part of the change as they will also respond to questions.
- **Don't forget** to test your post in [Dawn's test]before making it live!











Digital signage and posters
What to use and when

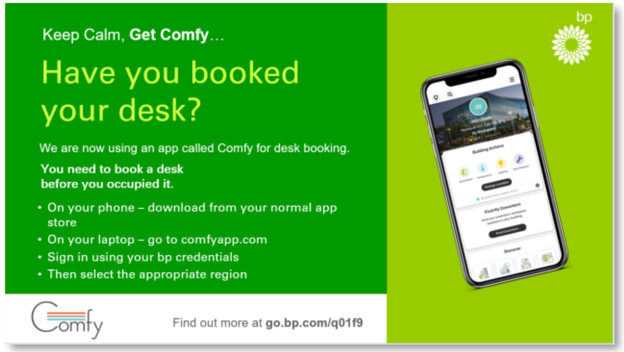
When to use digital signage and posters

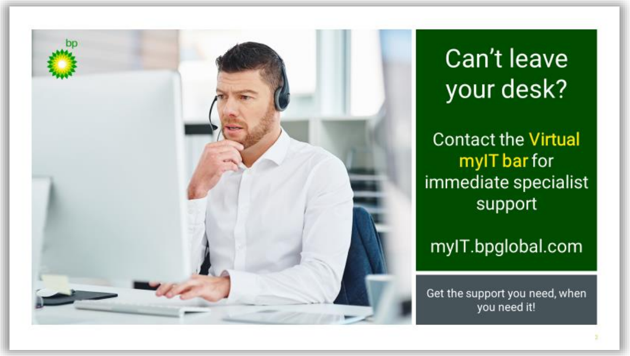
Digital signage and posters are a great way to publicize a change that will have an impact to many people in bp. They can be applied in the following ways:

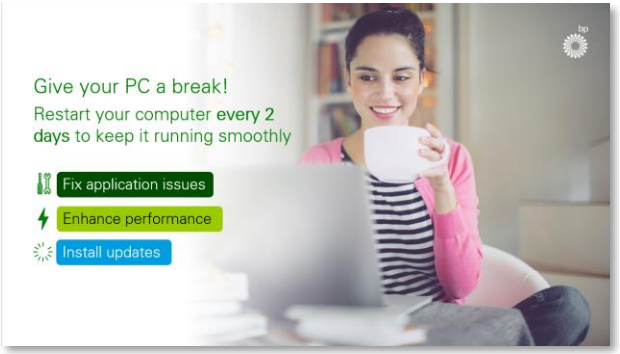
- Digital signage – plasma screens in areas of high people traffic (e.g. building reception desks, canteens)
- Posters – sites without digital signage capability but in places with high people traffic (e.g. coffee stations, toilet doors and hallways)

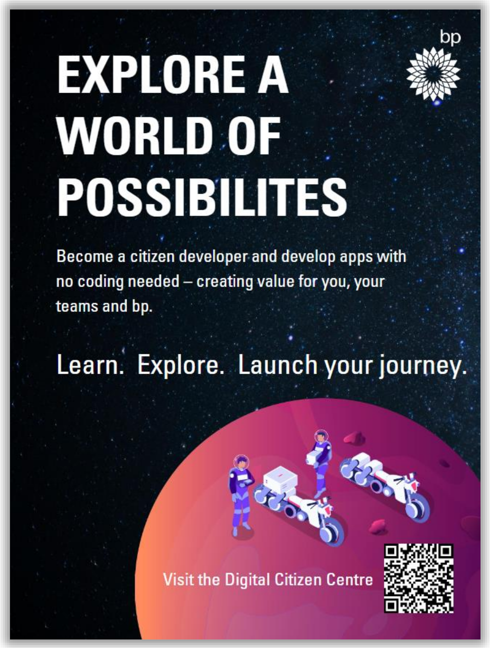
Things to consider

- They should be used when a change has a large impact to a large audience and awareness is vital to successful adoption
- Poster spaces on sites are reserved for bigger projects only
- They should be scripted, and a clear brief provided to minimize rework
- Share with site service owners and ask them to display at their site(s)
- Use Microsoft stock images and [bp image shop]
- Printed posters should be used sparingly due to the environmental impact



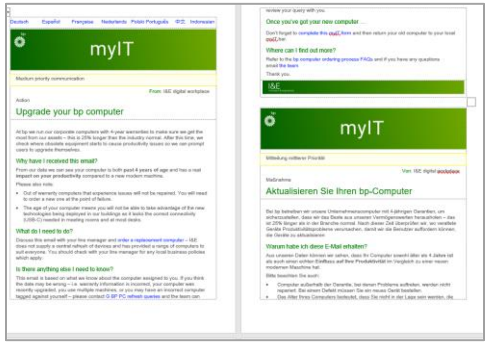


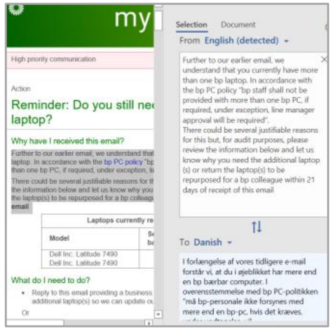




Translate communications using MS translate

Translations provide a better customer experience as it ensures communications can be understood by as many people as possible. If the audience is global you may want to consider translating emails, posters and plasmas into the key 8 languages (Spanish, Dutch, French, Chinese, Indonesian, Portuguese (Brazilian), Polish and German).





Prepare your email

In a word document, copy and paste the text/email down the page

Translate selection

Highlight text you want to translate and click **insert**
Click:

- **Review**
- **Language**
- **Translate**
- **Translate selection** and **select a language**

Link to languages

Add languages to the top of the page (French, Spanish etc.) and link – this helps people access the right language easily.

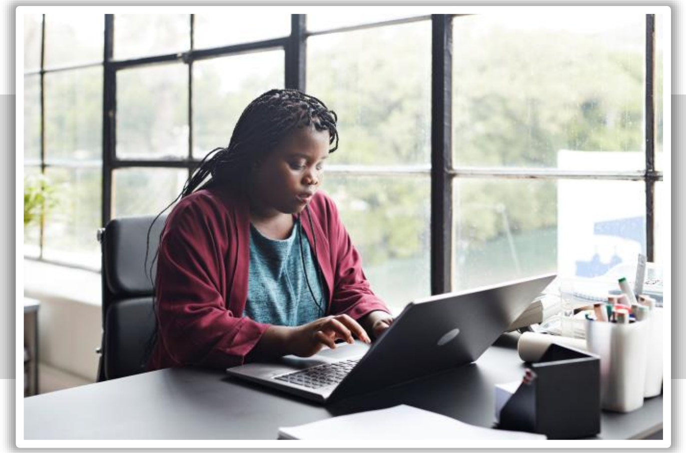
Click on the **language** at the top, **Ctrl K** and **place in the document.**

Ask translators to review

Post finished document in the translations Teams channel. Don’t forget to specify which languages you want reviewed and a completion date

Additional considerations

Cascade, senior endorsement and timing



Who will cascade the messages?

- Communicate with SSOs/RPOs early so that they can support their customers and cascade the message
- Communicate with service desk early so that they can cascade the message to all support staff who can then support their customers

Influencing from the top

Asking leaders to deliver the key message (e.g. post on Viva Engage) will help set the vision and direction of the change as well as move people along the change journey (i.e overcome resistance)

Timing of communications

- Frequency - How often do you need to communicate? Should you send reminders, final reminders?
- Avoid clashes - You don't want your communications to be overshadowed by another big change happening in the business
- When to post – best practice is to communicate on Tuesday, Wednesday and Thursday around mid-morning

Accessing digital communities across bp

Leverage existing networks to support change activities

Community Central App

The Community Central App was built in response to feedback highlighting the need to have a central location to find internal communities across bp.

Watch the video for an introduction to the app.

Using the Community Central App to support change activity

1. Access the Community Central App
2. Browse available communities and join
3. Reach out to the community lead and request their support with your change initiative – either to push messaging or as a guest speaker in a regular forum.

Setting up a community

If you lead any kind of internal community, such as a CoP, network, BRG, or event series, register it within the Community Central App.

Watch the video for instructions on how to add, edit or delete within the app.

“

Training strategy

”

Training strategy - overview and approach

The **training strategy** provides a formal framework to assess training requirements and develop training interventions to support the change.

Inputs

- Change impact assessment
- Stakeholder / subject matter expert interviews
- Service design sessions
- Initiative design documents and maps
- Business Readiness Assessments

Informs

- Training strategy and plan will provide a formal framework to structure and manage activity.
- The training plan will inform the business readiness checklist, prior to go live

Key steps	1. Conduct training needs analysis	2. Design training content	3. Determine approach for training delivery	4. Evaluate training effectiveness

Key activities	• Refer to CFC and CIA to understand the high-level training needs
	• Meet with SMEs to understand the impact of changes on training
	• Input into TNA template, ensuring items relate to change impacts
	• Validate priority level, intervention and suggested delivery method with SMEs and initiative team members
		• Clarify training:
		  ◦ Creation (scale & sign-off process)
		  ◦ Delivery (self-serve vs. taught)
		  ◦ Storage and maintenance
		• Storyboard training content
		• Test training prototype
		• Develop training material(s)
		• Translate material(s) (as required)
			• Select training delivery option:
			  ◦ Virtual classroom training
			  ◦ My Talent and Learning
			  ◦ Lunch and learns
			  ◦ Knowledge Based Articles
			  ◦ PDF / video guides
			• Deliver train the trainer (if needed)
			• Develop training schedule (if needed)
				• Determine and set acceptance criteria for training interventions
				• Conduct training evaluation (set approach if delivery is outsourced)
				• Determine responsibility for ongoing maintenance and revision of training material(s)
				• Update training material(s) as needed

Key outputs	TNA template highlighting: • Impacted audiences • Future state knowledge, skills and/or abilities • Priority level (L, M or H) • Training delivery method • Training curriculum	• Validated training material(s) • Translated training material(s) (if needed)	• Training delivery approach • Training schedule (if needed)	• Training acceptance criteria • Training evaluation approach • Training maintenance plan

Introduction

Purpose of the training strategy

The training strategy sets out the approach to end user training for a specific product or service.

Our role in training

We are responsible for developing the training strategy related to a specific change. This includes the following:

- **Training needs analysis** – we define what knowledge, skills and abilities are required by end users / stakeholders as part of the change.
- **Content design and creation** – we define the overall training principles and partner with stakeholders to support the development of training content with the aim of optimizing it for the end user.
- **Training delivery** – we advise on the best delivery mechanism for the training / educational content (e.g. train the trainer, lunch and learns, digital self-serve content etc.). In some cases, we may be involved in the delivery of training, but this is more of an exception process.
- **Evaluation** – we set the acceptance criteria for all training interventions.

Training principles and key considerations

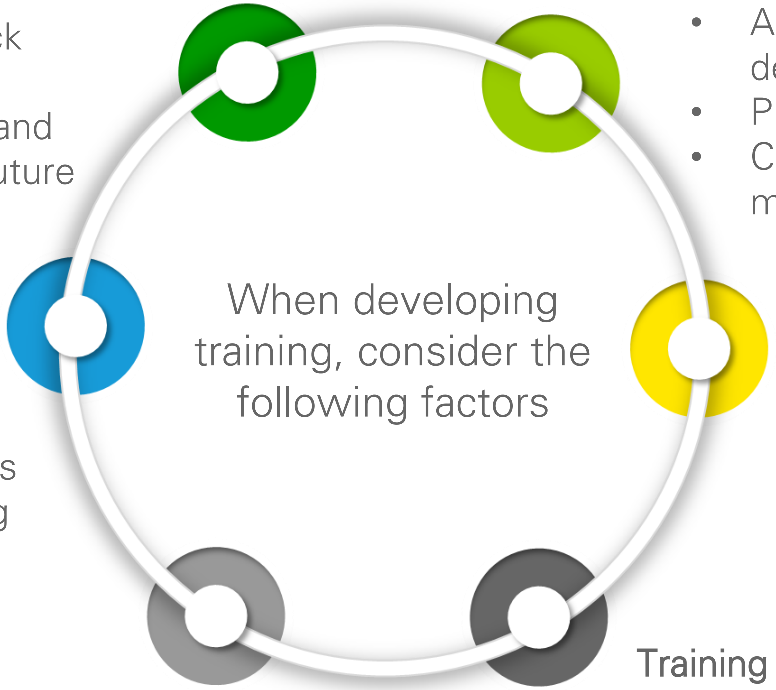
Key training principles

Accessible
- Train the trainer approach
- Leverage existing bp infrastructure

Relevant
- Role-based training
- Modular
- bp relevant

Engaging
- Interactive / engaging
- Just in time delivery
- Inclusive for all participants (accessibility and language)

Sustainable
- Business input
- Sustainable in BAU



Lessons Learnt
- Initiative and HCL teams engaged
- Provide a feedback mechanism
- Collate feedback and incorporate into future sessions

Pre-deployment
- Identify training leads and delivery partners
- Agree training content and delivery timeframes
- Plan training schedule
- Create course training material

Deployment
- Deliver training to schedule
- Identify and address any gaps in learning

Knowledge transfer
- Partner with technical team prior to go live
- Pilot training content
- Confirm sign-off process

Logistics
- Schedule virtual sessions
- Arrange handover of content to delivery team

Training environment
- What environment will be used for training materials and practice
- What is the refresh cycle?

Introducing the Training Needs Analysis (TNA)

What is the TNA?

A Training Needs Analysis (TNA) helps to define what knowledge, skills and abilities end users / stakeholders need to have in your future state.

The output is then used to inform your training approach, training modules and learner journeys, making the TNA a great starting point for developing effective training that is fit-for-purpose.

The TNA helps you to deliver the right training, in the right way to the right people.

What is included in the TNA

1. Audience (grouped by function, rank, business unit, geography etc.) – split by what they need to be able to do in the future state. This helps ensure that outlined training is relevant and tailored to each audience
2. Future state knowledge, skills and/or abilities – these are listed out as individual items, Recommend linking back to the CIA item for traceability
3. Priority level (high, medium or low) – by classifying the priority level, you can focus trainings to what is most important
4. Training delivery method - define how each training will be delivered (e.g. Lunch & Learn, PDF guide, video etc.)

Additional consideration

Depending on the scale of the change, the TNA may blend into the Training Curriculum or Training Plan.

- If the list of training needs is small, the training to be delivered as a result can be outlined and tracked in the same document.
- If the list is quite sizeable, it's best finalize the TNA and then create a separate Training Curriculum or Training Plan

Building the Training Needs Analysis

Gathering information

- Refer to the Case for Change and Change Impact Assessment to understand the high-level training needs
- Meet with the project team members and subject matter experts who are knowledgeable about the change and understand the impact on the end user
- Refer to specific design documents and deliverables (for example: process flows, job roles designs, technical requirements or specifications etc.)
- Participate in design working sessions as they occur to capture detailed change impacts and the corresponding training needs
- Conduct working session(s) with project subject matter experts after design sessions / phase concludes to capture and validate trainings needs

Things to remember

Training needs are not always static, especially if build and testing are still ongoing. Projects, especially tech-related are often fluid and subject to last minute changes. Conduct periodic check-ins with SMEs to validate recorded needs

Methods of delivery. It is useful to know the methods of delivery available to you going into this activity

Considerations. People, process (reporting, financial, ways of working), technology, data, policy and behaviours.

Recording the training needs

An Excel template is used to capture the training needs and should be amended to suit the size and scale of the change.

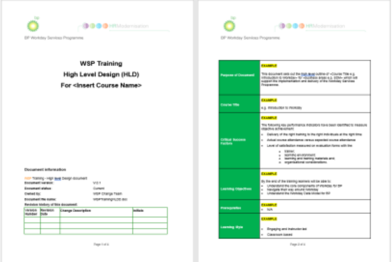
The template includes a Definitions sheet before the TNA- it is useful to outline your terms for anyone that may be coming to the doc cold.

If the TNA is of a substantial size, it's useful to have a Summary sheet that aggregates the training needs by stakeholder, priority and / or delivery method.

Approach for designing training content

High Level Design (HLD)

Structured template that helps shape & accelerate the content development



Review and feedback

Storyboard Content

High level outline of the training, to define key learning points and resources/tools.

Prototype Test & Standards Review*

Develop Materials

Develop training materials as per the HLD and storyboard using bp guidelines

Review and feedback

Update & Refresh

Upload to accessible knowledge repository

* A training prototype will be developed for each learning intervention, that will be shared with the Change Network to perform a standards review and gain feedback on messaging, flow, user experience etc. before the rest of the materials are developed

Guidance on creating training materials

Self-service digital content – quick reference guides, e-learning, videos

- Set the bigger picture before going into detailed steps
- Ensure text is (a) scannable, (b) accessible (language, font and colour), (c) concise (smart brevity) – refer to brand guidelines
- Have a clear purpose for each graphic and avoid visuals that do not add value to the training material
- Include a mechanism for the user to get further support (e.g. myIT forms, KBAs, HCL service desk, myIT bar etc.)

Presentation slides – including PowerPoint and Keynote

- Slides should be used to (a) provide a visual example, (b) anchor key concepts, and (c) display instructions for activities. Text heavy content should be left in handouts
- Set the slide dimensions to 16:9 (widescreen) and ensure fonts are accessible for the end user – refer to brand guidelines
- Keep text to a minimum. The trainer should avoid reading from the slide and connect with the audience instead.
- Have a clear purpose for each graphic and avoid visuals that do not add value.

Facilitator guides – serving as an instruction manual for the person delivery the training

- Ensure the guide is detailed enough so that anyone can pick it up and deliver the training.
- Provide estimates on who long activities will take.
- Describe the rational and objectives for activities with clear instructions on how they should be run
- Arrange the guide so the facilitator can scan the content easily (e.g. left column provides activity and timing, while right column provides detailed instructions.)

Participant handouts – a print or digital handout is often useful for all types of training and webinars

- Provide space for participants to complete exercises and make notes
- Share additional resources and references for those who wish to explore further
- Use clear legible font to enable ease of reading – refer to brand guidelines for more details

Options for training delivery

Channel/method of delivery	When to use	When not to use
Train the Trainer Training is delivered to a representative who will then deliver it to the business	If there is a large end user population that requires group-specific training	If training does not need to be tailored to any specific group
(Virtual) classroom training Training is delivered to a small group, virtually or in person	If the training is highly specialised for a small group of people	If there is a large end user population that would require a large number of sessions to complete
my Talent and Learning Our global training platform	If the training impacts most people across the business and is longstanding	If the training is for a small group of end users or likely to change regularly
Lunch and Learns Training is delivered to a small group, virtually or in person in an informal style	If series is already ongoing and highly engaged with, sessions can be used to delivery training on a change	If setting up solely for a change initiative
Knowledge Based Articles (KBAs) Information guides stored on the intranet	If you need a long-standing process that can easily be accessed by all	If the process is likely to change regularly
PDF / Video Information guides in PDF / Video format	If you need an alternative way to train on a process that can easily be accessed by many	If the process is likely to change regularly

Additional guidance and support

1. Use an existing channel of communication / training where possible (e.g. is it something that the productivity coaches can add to their service?).
2. A hands-on, personalised white glove approach should be reserved for highly technical, complex or high stakes situations.
3. If you need guidance on content design or support with content creation, reach out to the Digital design and content sub discipline.
4. If training starts to fall under career development or discipline pathways, engage Matty Hogarth within P&C.

Training evaluation

Using the Kirkpatrick model to evaluate our training interventions

Training evaluation involves the assessment of the effectiveness of the training intervention that has been applied to your change initiative.

The Kirkpatrick model splits training evaluation in one of four categories. We recommend using these categories as a guideline when evaluating our training interventions.

- Participant reaction - The degree to which participants find the training favorable, engaging, and relevant to their jobs. Examples include feedback surveys, 121 interviews, focus groups etc.
- Learning - The degree to which participants acquire the intended knowledge, skills, attitude, confidence, and commitment based on their participation in the training. Examples include e-learning test scores, completion status etc.
- Behavior - The degree to which participants apply what they learned during training when they are back on the job. NB – to support this level of assessment, it is recommended that specific drivers in place that reinforce, encourage and reward performance of critical behaviour e.g. recognition programs
- Results - The degree to which targeted outcomes occur as a result of the training (e.g. increased effectiveness, reduced costs). This is the most difficult to assess and should be based on defined critical success factors that have been identified at the start of an initiative.

“

Business Readiness

”

Business readiness - overview and approach

Business readiness focuses on identifying the critical actions needed before a change is implemented to ensure the end-users own and accept the change.

Inputs

- Change plan
- Change impact assessment
- Stakeholder management strategy
- Comms and engagement
- Training strategy
- Testing approach
- Discussions with senior initiative team members
- End-user/customer feedback

Informs

- Initial assessment establishes a baseline that subsequent assessments can be measured against.
- Final business readiness assessment informs the go/no go decision for the initiative.

Key steps	**1. Define readiness criteria and approach**	**2. Develop readiness assessment**	**3. Track readiness and identify areas in need of support**	**4. Confirm readiness acceptance and transition**

Key activities	• Review Change Impact Assessment and other key inputs to identify key readiness activities and planning
	• Develop readiness assessment approach, including frequency, timing and roles/responsibilities for capturing and analysing data
	• Develop business change readiness criteria and agree this with initiative team
		• Identify target methods for assessment
		  • Change Readiness surveys
		  • Focus group discussions*
		  • Feedback from end users following communications
		  • Feedback from discussions key stakeholders
		• Define objectives for assessment and develop questions
		Note: multiple readiness assessments may be conducted, dependant on initiative size/scope
			• Deploy readiness assessment at start of initiative to baseline results
			• Analyse results and Identify actions to remediate any concerns/risks
			• Monitor and track readiness against plans
			• Develop readiness summaries to present to key stakeholders
			• Deploy further readiness assessment as per plan, and repeat above steps*
				• Confirm business change readiness criteria to inform go/no-go decision
				• Provide relevant input to go/no go decision

Key outputs	• Business Readiness Assessment approach • Business Readiness Criteria	• Business Readiness assessment methods, objectives and questions	• Business readiness baseline assessment • Business readiness risks/issues • Business readiness summary report(s)	• Confirmed go/no-go readiness criteria

Introducing business readiness

Purpose of business change readiness

The purpose of change readiness is to uncover and assess business change risks and issues that pose a potential risk to go-live.

By identifying potential barriers (and enablers) to change, specific change interventions can be targeted where action is most needed that will help to make cutover and the go-live process as smooth as possible.

How readiness can be assessed and measured

For the risks to be identified, 'readiness' must first be assessed and measured. This can be done in several ways:

- Change Readiness surveys
- Focus group discussions
- Feedback from end users following communications
- Feedback from discussions with stakeholders and / or change network

High level approach

1. Define readiness criteria and approach – each change initiative is different and will require a tailored approach for business readiness
2. Develop readiness assessment tools (e.g. survey, focus groups, feedback)
3. Track readiness and identify areas in need of support – assess at the start of a change initiative to establish a baseline that can be measured against in future assessments.
4. Confirm readiness acceptance and transition – agree the final criteria used to inform the go/no-go

Readiness surveys
Establish a baseline and monitor overtime

Introduction

Change readiness surveys help monitor readiness needs and compare over time so emerging trends can be identified and tracked.

Aim to run approximately three change readiness assessment surveys for any change initiative:

1. at the start of the initiative
2. 3 months before go live
3. 1 month after go live

What will be measured?

Topics should be tailored to the change initiative but could include any of the following:

- Awareness of the initiative
- Understanding of the change impacts
- Commitment to adopt the changes
- Leadership support for change
- Capability to adopt new ways of working
- Overall confidence in change success

Who will be surveyed?

The change lead will identify the stakeholders to be surveyed periodically. This could include:

- Service owners
- Regional portfolio owners
- Site service owners
- HCL support desk
- Business leaders
- End-users

Example survey questions

	To what extent do you agree with the following statements	Strongly agree	Agree	Neither agree or disagree	Disagree	Strongly disagree
1	The case for change was clearly articulated to me					
2	I have been told how the changes will affect me and my team					
3	I feel listened to with regards to my views on this project					
4	I have full confidence in the change initiative					
5	bp leaders visibly support this change initiative					
6	My line manager supports this change initiative					
	Thinking about overall engagement, how satisfied were you with the following:	**Very satisfied**	**Satisfied**	**Neutral**	**Dissatisfied**	**Very dissatisfied**
7	Frequency of engagement					
8	Quality of the materials provided					
9	Knowledge of the facilitator / speaker / trainer					
10	Opportunity to provide feedback					
	Demographics					
11	What is your role in the business?	Leader	RPO	SSO	Engineer	
12	Which region do you work in?	UK	Americas	Europe	Middle East	APAC

Tracking business readiness criteria

The business readiness criteria tool tracks progress on key activities and deliverables which need to be completed in order to be implement business change successfully, and with minimal interruption to BAU.

Using the business readiness criteria template

1. Enter acceptance criteria (as defined by the change lead and / or project manager). Activities can be scaled up or down based on the size of the change initiative.
2. Highlight the progress using a RAG (Red, Amber, Green) status. The business will only be considered ready if all items are tracking as green
   - Grey – not started or n/a
   - Green – progressing to plan / complete
   - Amber – potential risk issue identified
   - Red – issues identified and in need of resolution
3. Provide a deadline for completion of activity
4. Comments can be added to provide further context on the status or specific actions.

Business readiness criteria template EXAMPLE

Purpose In order to support the change initiative, the project manager/change lead has captured and produced a checklist of activities which the change Teams will discuss with the business in order to support in Business Readiness.

ID	Change Strategy & Planning	Status What is our progress?	Deadline When do we need to deliver?	Comments What do we need to do?
1.1	User impact of change clear	N/A		
1.2	Change severity rating known	Red		
1.3	A plan exists for what change interventions will take place and when	Red		
1.4	Solution stable and comms/training etc can be drafted	Green		
	Number of activities	3		
	Number of activities completed ("Green")	1		
	% of activities completed	33.33333333		

ID	Stakeholder and Communications	Status What is our progress?	Deadline When do we need to deliver?	Comments What do we need to do?
2.1	Group comms aware (if >500)	N/A		
2.2	Site service owners briefed on change	Red		
2.3	All user communication drafted	Red		
2.4	All user communication checked and agreed	Red		
2.5	Users comms deployed	Red		
	Number of activities	4		
	Number of activities completed ("Green")	0		
	% of activities completed	0		

ID	Training	Status What is our progress?	Deadline When do we need to deliver?	Comments What do we need to do?
3.1	Requirements, scope and plan for training are defined and clear	N/A		
3.2	User training drafted, checked against technical documents/UAT, and revised	Red		
3.3	User training placed in the accessible areas - eg link on email, myIT&L, OneBP article, Yammer etc	Red		
3.4	Feedback mechanism for training in place	Red		
	Number of activities	3		
	Number of activities completed ("Green")	0		
	% of activities completed	0		

ID	Change Communities	Status What is our progress?	Deadline When do we need to deliver?	Comments What do we need to do?
4.1	All champions communication checked and agreed (if necessary)	Red		
4.2	Champions trained (if necessary)	N/A		
	Number of activities	1		
	Number of activities completed ("Green")	0		
	% of activities completed	0		

Business readiness assessment considerations

Change strategy and planning

- Is the change impact clear?
- Is the timing of roll out clear and understood?

Stakeholders and engagement

- Have all business stakeholders been communicated with?
- Is the business ready and accepting of the change?
- Is there any noise that needs to be addressed?

Standard stakeholders

- Are the support services aware and ready?
- Are the site service owners aware and ready?

Campaign management

- Is the campaign ready/already in progress?
- Have campaign materials been provided to change agents via a toolkit?
- Have resources been defined to deliver the comms and timing agreed?

Knowledge management

- Is the correct information documented and available to support the change?
- Is training in place? (where required)

Preparation for transition

- Has the approach for transition been agreed?
- Have all parties signed up for daily stand ups, to check progress against the transition plan?
- Have go/no go parameters been made and ready to execute?

Feedback management

- Are the correct resources in place to manage the qualitative feedback?
- Is a dashboard in place to manage the quantitative feedback?

Success management

- Have success measures been defined?
- Do success measures tie into the transition plan actions?

"Customer feedback"

Customer feedback - overview and approach

Understanding the **effectiveness of change interventions on customers throughout the change journey.** The outputs of this artefact allow the change time to redirect effort to areas of resistance, and continue focus on what is working.

Inputs

- Case for change
- CIA summary
- Business readiness
- Training needs analysis
- Change network
- Initiative KPIs & OKRs

Informs

- **If survey output:** Customer satisfaction survey which establishes clarity on the customer change journey
- **If non-survey output:** Product analytics (e.g. site traffic) to understand customer satisfaction, likelihood to promote the product/service (NPS), adoption and productivity metrics

Key steps	1. Determine principles and approach	2. Validate assumptions and develop questions	3. Distribute and perform analysis	4. Present results

Key activities	• Determine initiative type (E.g. Adoption, Productivity, Minimize Disruption)
	• Consider what success looks like and how benefits can be realized
	• Define the following for customer feedback survey
	  • Purpose
	  • Objectives
	  • Target population
	• Determine survey mechanism to use
		• Define **assumptions** on the outcome(s) of the survey
		• Begin to map assumptions versus objectives.
		• Ideate and iterate on your customer feedback survey questions
		• Consider their change journey and the project value stream objectives
		• Review questions and release to a small trusted audience to test (initiative team members).
			• Distribute customer feedback survey to target population
			• Analyse results and review:
			  • How results compared to expectations
			  • Areas requiring **change interventions** to improve scoring and satisfaction
			  • Survey results against previous iteration for the same group to uncover any trends
				• Develop summary of results (note – consider your **audience)**
				• Present the data clearly and in a simple manner
				• If practical, let the respondents know how you have acted on the results

Key outputs	• Approach and objectives of feedback survey	• Validated and reviewed set of questions for survey	• Customer feedback survey data	• Customer feedback survey analysis summary (different versions may be required for differing audiences)

Customer feedback strategy

Why is customer feedback important?

Customer Satisfaction

- How do we know how satisfied our customers are at each stage in the change journey?
- Satisfaction scores enable us to **shift our priorities and deploy interventions** as and when they are needed.
- Responses provide an evolving near **real-time picture of emotions and energy.**

Objective Data

- Engagement sessions/other interactions often present several drawbacks in collecting objective data.
- Anonymous customer/user data gives us the **objective & honest information we need.**

Readiness Levels

- How do we truly know the readiness levels of our customers?
- Deploying readiness surveys can help **mitigate risk** and keep stakeholders satisfied.

Engagement & Listening

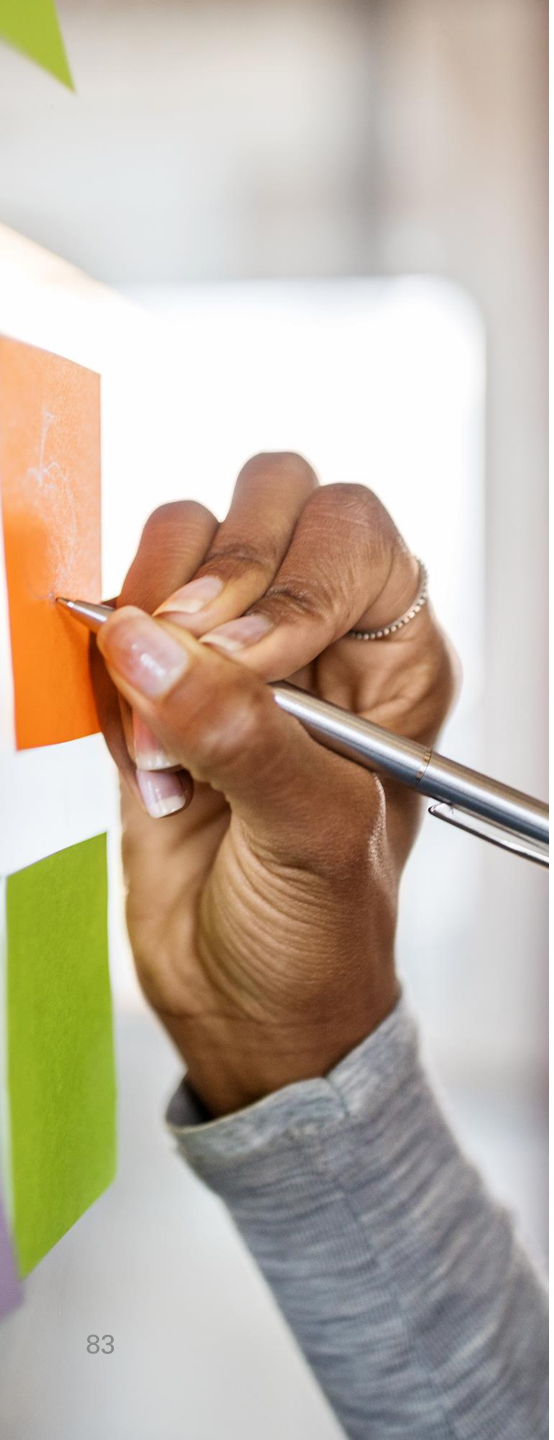
- How do we show the customer we have **listened to their feedback, taken it seriously, and acted upon it ?**
- Surveys show the customers and stakeholders we are interested in objective engagement data and will **act on this data appropriately.**

Training Evaluation

- How do we know how **effective** our training design and delivery is?
- Post training surveys can offer valuable data on **learning satisfaction and additional learning needs.**

Resistance Management

- How do we know the **levels** of resistance and **who is resisting?**
- Customer feedback allows us to **identify key population/stakeholder hotspots** and respond accordingly.
- Additionally, positive customer feedback data can help bring more resistant stakeholders into champions.



Gathering customer feedback
Options for gathering the information you need

There are several effective options to conduct customer feedback surveys, including both physical and digital formats. The deployment mechanism for your survey will depend on what you are trying to achieve, your impacted stakeholders, their location, and needs, in addition to key stakeholder/leadership expectations on presenting the survey data.

Quantitative Survey Mechanism	When to use	When not to use
MS Forms/Survey Wizard	• Larger formal surveys • Where large amounts of data will be expected and presented on • Branching potential	• Not to be used as a quick survey tool • Not suitable for small groups and informal feedback
Vevox	• Suitable for informal and/or anonymous feedback • Small groups <15 • Real time feedback	• For large survey deployments >15+ • Where you expect to need large amounts of data
Physical Survey	• Suitable for location specific surveys • Where response rate is required to be quite high e.g. >30%	• Where you have small amounts of resources • Where multiple locations are needed to respond

Qualitative Survey Mechanism	When to use	When not to use
Email/Teams/Viva Engage customer feedback	• For ad-hoc informal feedback (e.g. quick feedback from customers)	• When quantitative customer feedback is required

Consider value streams & ADKAR

Adoption, Productivity, & Minimize Disruption

When in the initial stages of survey completion, it’s best practice to first consider your project type/value stream i.e. the value we add to the project/product is to **either increase adoption, productivity, or to minimize disruption in the organization.**

Adoption

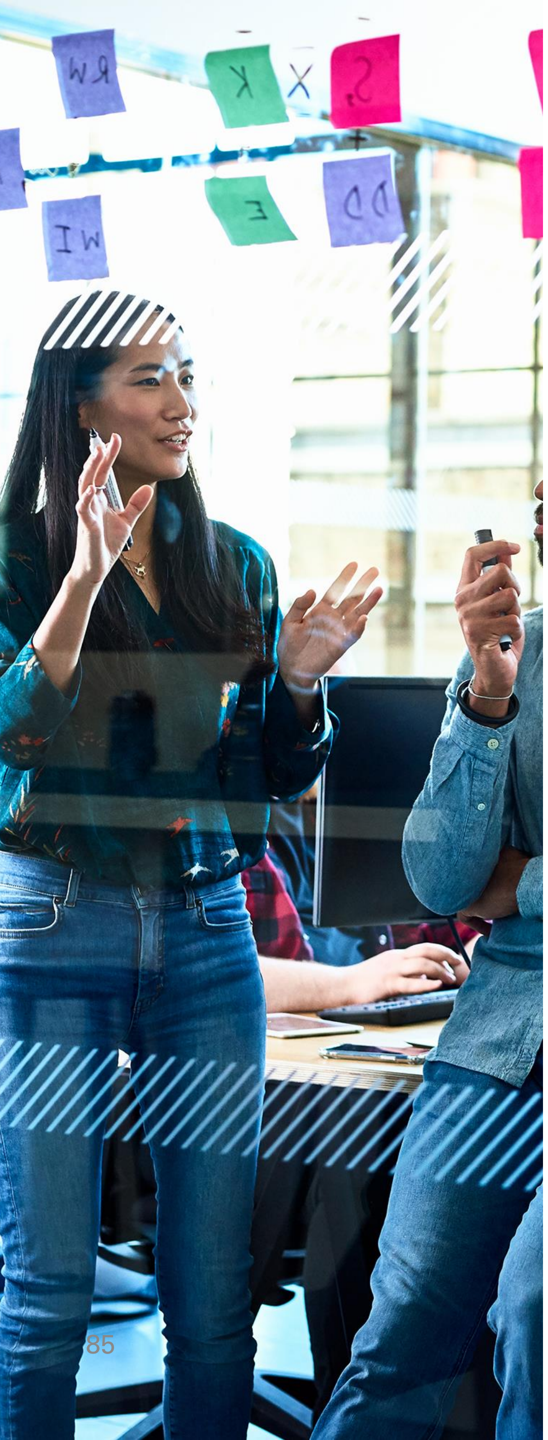
- Consider key adoption focused questions which target user **desire** and **willingness** to adopt the new product.
- Focus on barriers and blockers to adoption.
- Other mechanisms for adoption should not be neglected such as gathering product system statistics on adoption.

Productivity

- Consider how you would like users to get the most out of your product and the need to **build awareness** around what is possible/ the **value of the product to them.**
- Probe their awareness of features i.e. did you know that product x can…..?

Minimize Disruption

- Consider the user’s **change journey** from business as usual to disruption back to business as usual
- **How was this experience for them? How manageable was the change? How well was the change communicated. What could be done better etc?**



Tips and tricks

1. Always be mindful of your **project value stream** type and what you hope to **achieve.**

2. Consider your **assumptions** – this will be the foundation to form questions.

3. Test and **validate** with your team first – are the survey questions aligned to the purpose?

4. Deploy the appropriate type of survey (format) for the situation/needs and what you wish to achieve i.e. **MS Forms, Vevox, Physical Survey…**

Tools and templates

Capturing customer feedback

SharePoint Site Owner Satisfaction Survey

SharePoint Site Owner UAT Satisfaction Survey

Accelerate (DevOps best practices & challenges survey)

Accelerate (DevOps best practices & challenges survey approach & principles ideation mural)

“

Change reinforcement

”

Change reinforcement - overview and approach

Reinforcing (or sustaining) the change is the process of ensuring the changes made within an organization become the 'new norm'. This process begins at the start of any change initiative and should be considered past go-live.

Inputs

- Readiness assessments
- Feedback from initiative go live - can come from a variety of sources
- Change impact assessment
- Training strategy
- Discussions with key stakeholders to determine appropriate reinforcement methods

Informs

- Data from reinforcement activities will inform ongoing adoption tracking.
- In some cases, the output may trigger a change in service design or the product roadmap.

Key steps	1. Identify change reinforcement requirements	2. Deliver change reinforcement activities	3. Monitor progress

Key activities	• Identify metrics which will be used to assess change reinforcement
	• Plan out change reinforcement checkpoints
	• Determine incentives used to reinforce the change - Carrot (e.g. recognition) or Stick (e.g. penalty)
	• Identify influential stakeholders/leaders to reinforce the message - they can cascade messages and influence adoption
	
	Note: Involve multiple stakeholders in developing and testing the initiatives to identify early signs of resistance
		• Execute change reinforcement activities, such as
		  • Rewards - e.g. public recognition on Viva Engage
		  • Penalties – e.g. end-user not meeting performance KPI
		  • Demonstrate success with case studies
		  • Rminders to keep changes fresh in people's minds
		  • Continue to leverage senior stakeholders to reinforce messages (top down)
		
		Note: Different reinforcement activities should be used depending on where end-users are on the change journey
			• Track reinforcement progress against key metrics
			• Continually seek key stakeholder feedback and other sources of data
			• Adapt change interventions, training material, communications activities, etc. as required

Key outputs	• Change reinforcement metrics • Approach for change reinforcement (incentives)	• Change reinforcement activities	• Change reinforcement monitoring

Reinforcing the change
Introduction

What does it mean?

Reinforcing (or sustaining) the change is the process of ensuring the changes you make within an organization become the 'new norm'. It ensures the change **sticks** and **stays stuck**!

Why is it important?

If you don't reinforce the change people will naturally revert to their old ways of working

When do you do it?

Reinforcing the change happens from the very beginning of the project and it does not stop until the benefits have been delivered at the end

Planning to reinforce the change

Ensuring the change sticks

Make sure the proposed solution is a good fit for the organization

- Involve some stakeholders in developing the solution – ask for volunteers to help with user testing and feedback
- Communicate with stakeholders who show early resistance and concern – they may provide insight that will improve the design and increase adoption
- Identify potential areas that clash with existing processes and adapt your change interventions to make it a good fit e.g., consider what training you will need to provide to prepare and shape the stakeholders to adjust to this

Determine what incentives will be needed to sustain the change throughout

Consider rewards (carrot approach) or penalties (stick approach) –

- Rewards such as public recognition on Viva Engage makes people feel appreciated and encourages commitment
- Penalties make it clear what will happen if they do not adopt the change and adds pressure e.g. line managers penalise employees (telling off) for not doing what they have been told. This can be incorporated as part of annual performance review

Identify influential stakeholders to reinforce the message - they can cascade messages and influence adoption.

Influence from top down – identify the key leaders that you have mapped out and how you will engage with them to get them on board

Plan when you are going to check in with people

Consider checking in at every stage of the change journey and reacting accordingly

- Awareness – prepare a survey to find how many people know about the change? If response is poor, more communications may be required
- Desire – conduct focus groups, surveys or one to one conversations to find out how people are feeling
- Knowledge – analyse the number of people attending training sessions or make a list of types of questions being asked.
- Ability – ask SSOs/RPOs how things are going or feedback from stakeholders on Viva Engage
- Reinforcement – tactics (refer to next slide)

Reinforcing change after implementation
Tactical examples

Celebrate success
Builds morale and allows people to see the positive effect it has on the organization

- Share success stories on Viva Engage
- Post short videos on Viva Engage to showcase the change journey
- Collect testimonials and share through different communications (e.g. newsletter, Viva Engage)
- Ask senior leaders to publicly recognise the success – posting on Viva Engage or show recognition at meetings

Reminder communications
Maintain buzz and momentum

- Post top tips on Viva Engage to support people through change – listen to people's main concerns and post accordingly
- Share important updates on Teams and Viva Engage
- Share plasmas at sites to encourage certain behaviours
- Go back and do lunch and learns

Collect/analyse feedback
Following up to understand if the change has been a success or not

- Surveys – share on Viva Engage or with your change networks
- Have one to one conversations or focus groups to understand what could be improved
- If feedback shows that people are not following the change you may need to revisit elements of ADKAR and offer more awareness communications, training guides or workshops

Value stream success data criteria

Check feedback continuously to clarify areas in need of reinforment

It is important to continually check in with our customers as they move through the change journey. The ADKAR framework provides a logical sequence of milestones to do so, and understand customers' level of commitment, resistance, desire, and general awareness of change.

Customer-centric Data principles: 1 Capture 2 Analyze 3 Disseminate

Phases	1 Awareness	2 Desire	3 Knowledge	4 Ability	5 Reinforcement
Productivity	• Adoption % • Formal feedback (number of user aware of the changes) • System/product user statistics • No. of new users	• Viva Engage and Teams informal feedback • Sentiment survey	• Customer surveys (awareness of how to change) • Proficiency metrics • Current state process/transaction analysis • Change network checkpoint (short survey)	• Customer surveys (ability to be able to change) • Training surveys (pre & post) • System/product user statistics • Proficiency labs • Change network checkpoint (short survey)	• Hyper care % • Unique site visits post-launch • User adoption success criteria • Stabilization metrics • Net promoter score (0-100)
Minimize Disruption	• Adoption % • Formal feedback (number of user aware of the changes) • System/product user statistics • No. of new users	• Viva Engage and Teams informal feedback • Sentiment survey	• Customer surveys (awareness of how to change) • Change network checkpoint (short survey)	• Deployment success by uptake • Deployment success by hours/cost saved • Change network checkpoint (short survey)	• Hyper care % • Unique site visits post-launch • Go-live experience survey • Net promoter score (0-100)
Adoption	• Adoption % (IT) • Formal feedback (number of user aware of the changes) • System/product user statistics • Anticipated benefits • No. of new users • Successful early adopters	• Viva Engage and Teams informal feedback • Sentiment survey • Behaviour change (identify key KPIs) survey	• Customer surveys (awareness of how to change) • Change network checkpoint (short survey)	• Deployment success by uptake • Deployment success by hours/cost saved • Change network checkpoint (short survey)	• Hyper care % • Unique site visits post-launch • Net promoter score (0-100)

"

Additional considerations

"

"Testing"

Testing overview
Introduction

Purpose of testing

Product testing is a key component of business readiness on any initiative. It is designed to:

- Document test scenarios which could be used to verify and validate the business requirements and make sure that it is functioning well and works as designed.
- Ensure that all acceptance criteria for the solution are met.
- Record & track the defects in all test stages to avoid defect leakage to production.
- Conduct functional test & other in-scoped test phases and performs the bug fixing in relevant processes areas.

Role of the change manager

Most initiatives have a dedicated test lead, who will set out the strategy and manage the implementation of all testing activities.

However….

In some cases, (either small scale projects or those with resource constraints) you may be asked to step in and help with aspects of testing, including:

- Sourcing test groups and scheduling sessions
- Briefing testers / facilitating testing sessions
- Writing test scripts on user journeys
- Co-ordinating translation testing

Testing type overview
What / why / who and responsibilities

Testing type	What does this involve?	Why is it important?	Who tests?	Testing managed by?
User testing of design	Assess key design options with end users	Ensures product design meets end user needs	Diverse group of product users	Service design lead*
Functional testing	Testing aspects of a product in an integrated environment where two or more products interface.	Checks that processes work as expected through the system integrations	DevOps team	Initiative test lead / DevOps team lead
User acceptance testing (UAT) of product	Functional testing of a complete process in an integrated environment	Ensures product functionality meets the needs of the user	Service owners & SMEs	Initiative test lead*
End-to-end testing (end user)	Check end-to end customer journeys perform as expected.	Identifies any major issues to be addressed before go-live and subsequent releases	Diverse group of product users	Initiative test lead*
Translation testing	Check auto-translated web pages in German, Spanish, Dutch and Portuguese, Chinese and Indonesian with local language speakers.	Improves quality of translation	Local translation team (~30 people globally)	Initiative test lead*
Accessibility testing	Assess myIT against the Web Content Accessibility Guidelines (WCAG) 2.1 AA standard.	Ensures product is accessible for people with different neuro disabilities	N/A	Design Studio (managed via Service design lead)

*Change lead may be required to support or lead testing activity

Things to consider for testing activities

Managing testers

- Source a broad mix of testers (e.g. Location, role, seniority, entity)
- Testing must be voluntary with candidates opting-in
- Avoid using the same testers again and again. If unavoidable, ensure the adequate spacing between testing sessions
- Expect dropouts – over allocate sessions to ensure you have adequate numbers

Briefing / facilitation

- Always conduct a briefing before testing commences – provide context, clear instruction for the process, timeframes and feedback mechanisms
- You don't need to be an SME to facilitate testing sessions. Leverage technical expertise from colleagues
- If asked to facilitate a testing session, speak to the test lead / analyst / developer ahead of the session to agree structure and roles

Developing test materials

Testing objectives and parameters will be defined by the test or technical lead. Your role is to simplify the content, so it is accessible to all testers.

- Write testing instructions and user journeys in plain English using smart brevity
- Ensure materials are accessible to all testers and not gated behind secure Teams or SharePoint sites
- Ask a colleague to review the process and materials before formal testing, making changes, where needed

“

Behaviour Change

”

Behaviour change

Ensuring customers adopt target behaviours to embed change

Focuses on using behavioral interventions and methods to encourage customers to demonstrate behaviours required to make an initiative successful. It is a key component of reinforcing change and should be considered at the beginning of an initiative and tracked throughout.

High level approach

Define target behaviours

1. Identify current state behaviours and define target behaviours
2. Align on priority to and from behaviours and confirm pilot scenarios
3. Identify metrics to quantify impact on business

Design and pilot interventions

4. Identify and prioritise a set of behavioural interventions
5. Pilot behavioural interventions
6. Continuously monitor and track impact

Scale and iterate

7. Evaluate pilot interventions
8. Itenrate the approach across target customer base
9. Scale successful behavioural interventions

Guiding principles

Metrics based

Define target behaviours aligned to target changes and identify quantifiable metrics

Continual evaluation

Evaluate progress across the change journey

Test and iterate

Don't strive for 100% rates, test interventions and methods to understand validity and rollout

Recognise and reward

Recognize and reward demonstration of target behaviours to embed new ways of working

Approach overview

Breakdown of behaviour change

Define target behaviours

Objective: To align on the behaviours required to deliver the initiative, uncover current barriers and identify metrics to quantify behaviour change.

	1. Gather Insight and identify current to target behaviours	2. Align on priority to and from behaviours, and confirm pilot scenarios	3. Identify metrics to quantify impact
Process	• Gather and analyze data on current and target behaviours, both from initiative team and customers • Refer to CIA and notes from stakeholder interviews as basis for current behaviours • Discuss target behaviours with business and initiative leadership team – this should be aligned to overall initiative objectives	• Hold a working session to bring together senior stakeholders to validate the target behaviours • Define priority, or 'must have' behaviours • Agree on group or business area to pilot behaviour change interventions • Identify scenarios where target behaviours often fail, to use as pilot scenarios	• Identify Key Performance Indicators (KPIs) and create a mechanism to track performance for each business scenario • Gain sign-off on KPIs from senior stakeholders (initiative team and business) Note: Where possible, define quantitative KPIs, or those with pre-existing methods to measure outcomes
Inputs	• Stated target behaviours • Current behaviours and pain points	• Results from behaviour gap analysis • Working session agenda/plan	• Prioritized target behaviours and pilot scenarios
Outputs	• Current to target behaviour gap analysis • Initial barriers to change	• Prioritized target behaviours • Prioritized pilot scenarios	• Agreed behavioural KPIs and measurement mechanism

Approach overview
Breakdown of behaviour change

Design and pilot interventions

Objective: To design and deploy behavioural interventions to correct current state pain points (as identified in 'define target behaviours' step

	4. Identify and prioritize behavioural interventions	5. Pilot behavioural interventions	6. Continuously monitor and track
Process	• Design behavioural interventions to improve each of the prioritized scenarios and embed target behaviours • Interventions are typically either situation driven (e.g. changes to office set-out, IT equipment) or people driven (a person consciously changes behaviour to influence others)	• Situation-driven behavioural interventions are deployed within the agreed group or business area for Pilot • People-driven interventions are tested by key stakeholders, such as change agents • Monitor results	• Capture results (using pre-defined measurement mechanisms) and report back to wider team • Evaluate overall effectiveness of interventions
Inputs	• Outputs from 'Define target behaviours' step	• Agreed list of behavioural interventions	• Effectiveness data
Outputs	• Behavioural interventions to be tested in Pilot	• Effectiveness data	• Summary of evaluation of behavioural interventions

Approach overview
Breakdown of behaviour change

Scale and iterate

Objective: To iterate and scale the most effective behavioural interventions, in order to embed target behaviours across the target population.

	7. Evaluate pilot interventions	8. Iterate approach across target population	9. Scale successful interventions
Process	• Compile data gathered in step 6 into a summary evaluating all of the interventions tested in the pilot • Develop recommendations on further roll-out based on the results of the evaluation	• Iterate successful behavioural interventions in across target population (impacted stakeholders) • Adjust or identify and include additional interventions, if required	• The most effective behavioural interventions (based on business benefit), are scaled across the target population
Inputs	• Data gathered during Pilot	• Update list of behavioural interventions (based on pilot results)	• Insights from steps 3-8
Outputs	• Pilot effectiveness report • Next steps to rollout	• See outputs in steps 3-7	N/A

"Agile for change management"

Agile change management

What is Agile & why we need to consider Agile

What is Agile?

- Lower case **"a" agile** is an embedded trait or attribute characterized by durability, resilience, speed, flexibly, and preparedness.
- Upper case **"A" Agile** is an iterative approach to product development with articulated principles, values, methods, roles, processes and tools.

At its core, Agile represents a **dynamic shift in mind-set, values, principles, practices and tools,** requiring a responsive, data-driven change management approach to fully realize the value of organizational agile practices

Agile for Change Management

10 Reasons to implement

In Digital, we are facing the following challenges….

- Increasing digital investment and disruption
- Need to rapidly innovate services and shift to a product-led world
- Pressures and speed of change

Agile has grown in popularity for several reasons….

- Increased speed and flexibility
- High failure rate with large scale waterfall programs
- Close collaboration between developer teams and business (including change)
- Error resolution and opportunities for course correction
- Continuous iterative feedback
- Agile principles help people think collaboratively
- Delivers incremental business value

Agile change approach
Approaching digital change

As Agile requires a shift in principles, approach, values, and tools, we must consider that the team roles in a product-led agile world will also be different and our change discipline must be able to integrate with ease.

Sprints

A sprint is a short, time-boxed period when a scrum team works to complete a set amount of work.

With Scrum, a product is built in a series of iterations called sprints that break down big, complex projects into bite-sized pieces.

Scrums and roles

Product Manager
- Responsible for overall product management/delivery and benefits realization tracking to KPIs/OKRs

Scrum Master
- Responsible for overall success of the scrum process, ensures observance of agile principles, and tracks and removes blockers

Sprint planning and tools

- Sprints are used during the Realize-Build phase and generally last a period 2-4 weeks in duration
- Work is undertaken using a prioritized backlog of user stories that has been agreed upon with the Product Manager/Owner
- Scope (user stories) may be added or removed during the sprint based on sprint progress
- Tools such as ADO are typically used to manage sprints

Product backlog

- A product backlog defines the business requirements for the solution and is made up of user stories which are descriptions of how the users interact with the system and what they expect from it
- User stories typically follow the pattern of "As a… Iwant/need.. so that.. "
- Using a digital requirements management tool (such as Jira) is recommended for this

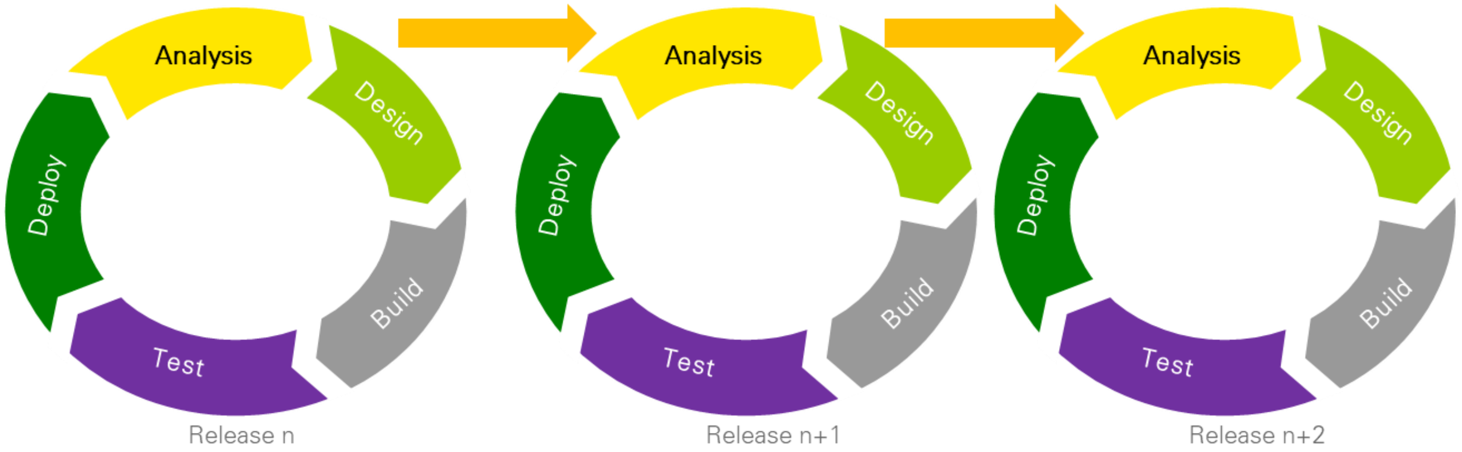
Agile vs Waterfall
Method & example

Within Digital at bp, you will often be required to adapt to both Agile and Waterfall methodologies when implementing change, therefore it is important to consider the differences between the two.

Traditional Waterfall change approach

- **Upfront requirements definition** "This app must be able to measure heart rate, steps, sleep, blood pressure."
- **Plan driven** "I have a deadline for our launch so we're backing up all of our activities according to the launch date."
- **Typically "big bang" releases (6 to 12 months)** "My customers receive updates every half year or so, with major revisions to the software."
- **Less frequent executive/client communication** "My executives want weekly reports, let me know when I can see something."
- **Development with separate groups** "I have separate teams working in their respective functional teams."
- **End-to-end testing occurs at the end** "We'll have a dedicated testing phase before we launch the health app."

Agile change approach

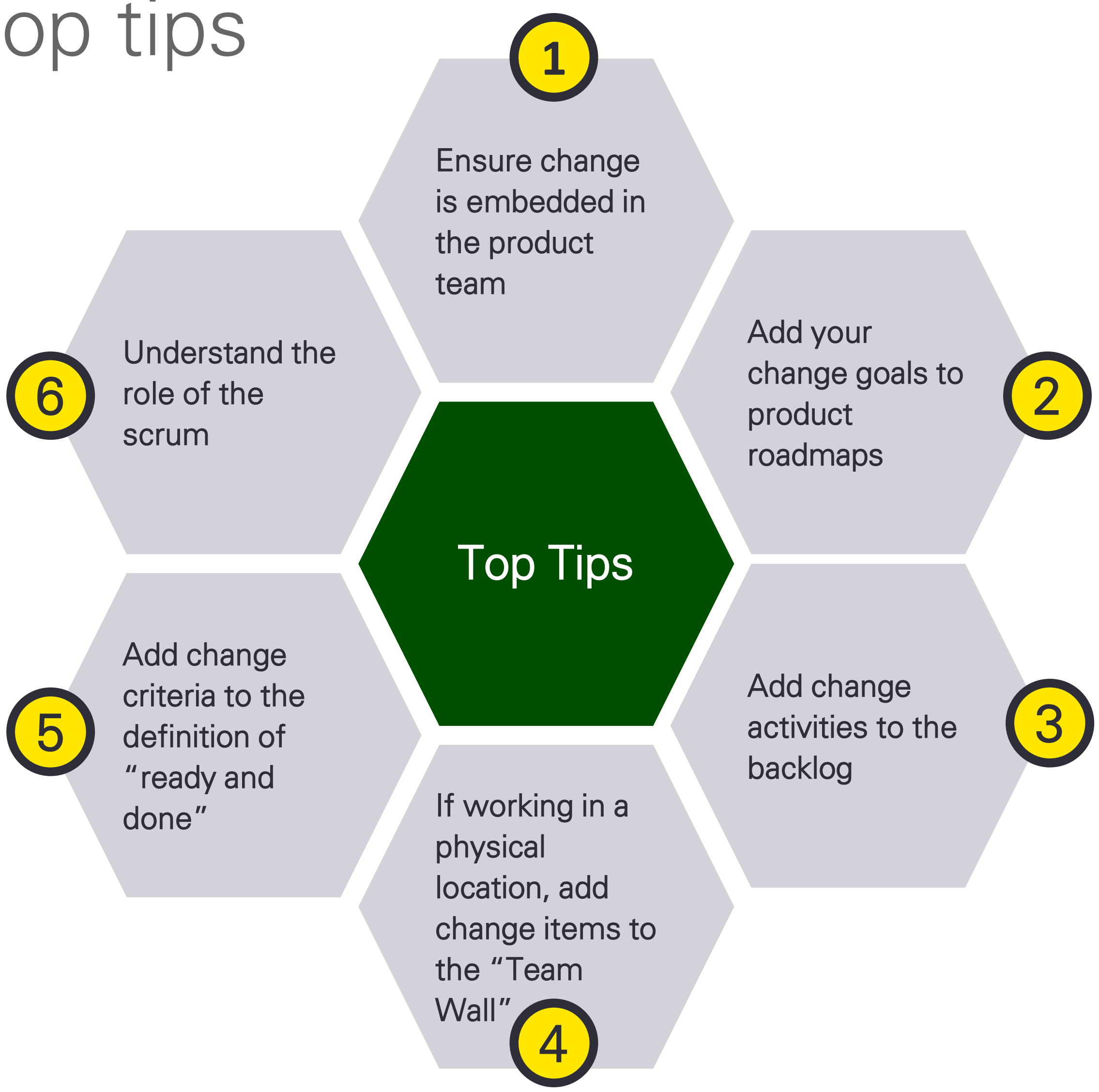


- **Evolving requirements** "I want an app but I don't have to decide all the functionality. Let's start with the minimum viable product of measuring heart rate and see what that looks like before adding on additional features."
- **Feedback-driven** "My users in the support forum are constantly reporting bugs and recommending features that they want to see (sleep matters more to them than blood pressure) and I'm realigning my backlog prioritization to meet those needs."
- **Short releases (2 to 4 months)** "My customers are receiving updates and the latest builds on an on-going basis and they will see continuous improvement."
- **Short releases (2 to 4 months)** "My customers are receiving updates and the latest builds on an on-going basis and they will see continuous improvement."
- **Development in cross-functional teams** "Each of our teams has a product owner, architect, front-end coder and back-end coder."
- **Integration testing occurs through the iteration** "We'll do unit testing, integration testing and regression testing throughout."

Agile vs Waterfall
Change activities

	Waterfall (Design → Test → Build)	Agile
Key differences	Design comes before build: • The end solution has been clearly defined prior to build, with minimal subsequent changes. • Build does not start until there is a clear, detailed design in place.	Design and build are iterative: • High-level design needed before build begins but detailed decisions can be made during build process. • Multiple iterations or "sprints" are completed to build, revise and finalize different parts of the solution.
Change implications	• Change Impacts can be identified predominantly during the design phase. • Broader alignment activities take place earlier in the project and can be locked down early in the program without too much iteration (project dependent). • Launch is scheduled for the end of the build. • Engagement and Communications activities may focus on schedule. • Training development timeline is comparatively longer as design is stabilized earlier in development.	• Change Impacts can only be identified at a high-level during design but will need refinement as details become known, requiring close collaboration with business/technology. • Planning is iterative and plans become "living" documents. • The initial launch comes quickly and to a small group (often beta version). It provides little benefit but is iterated rapidly. The change management approach becomes a longer continuous engagement and focuses on helping to prioritize the future roadmap. • Engagement and communications activities must be flexible enough to handle the changing design, iteration of the product, and changing roadmap strategies, and resequencing of priorities. • Comms focuses more on features and less on timelines. It considers the Delivery Teams' engagement with customers. • Training happens as features are released and not just at the end of delivery (generally training occurs on the more developed iterations for the customer).

Agile change management
Top tips



Top tips

Collaboration is key

- All members of the Agile Team understand their responsibilities and ensure they deliver.
- Stakeholders around the organization collaborate with the Product Owner as the interface to the Project Team.
- The scrum master collaborates with both the Product Owner and the Delivery Team to ensure smooth running of each iteration.
- Effective change management enhances solution design by facilitating effective
- Collaboration between scrums and the customers

Focus on product KPIs/OKRs and overall value

- Delivering a solution that truly meets the needs of the organization.
- Business outcomes reassessed on an on-going basis.
- Feedback from the customers obtained through review with business users at the end of each iteration.

Agile change management

Sample of Agile deployment roadmap