

Assessment to Action in a Week

For those who are reticent about getting started with the PCI tools and about conducting an assessment because of worries such as “It’ll take too long” or “No one will respond” or any other resistance reason, here’s the week-1 diary of a real case when we arrived to help an organisation with their (previously failed) ERP implementation.

Change Agents (Us)	Sponsors	Adapters
Meeting with initiating sponsor to agree our approach and to explain the importance of collecting change legacy data (<i>assessment</i> for quantitative data and <i>focus groups</i> for qualitative data).	Sponsor agreed use of Initiative Legacy Assessment (ILA) and took action to immediately explain to the leadership team (directors of and therefore reinforcing sponsors for each functional area) what we were doing and to get them to commit to sending people to focus groups.	
Drafted a communication e-mail to come from initiating sponsor to explain ILA and to ask the whole organisation for feedback.	Initiating sponsor sent out assessment e-mail. Deadline for returns = Wednesday evening (with any assessment you probably get most of the responses you’re going to get in the first few days).	
Organised 1-hour focus groups to follow up on the assessment – one for each function – to be held on Friday.	Communicated with line managers (local sponsors) to explain process and importance of sending people to focus groups.	People completed and returned ILA assessments.
Contacted line managers (local sponsors) to ensure they had got the message and were planning to send people to focus groups.		People completed and returned ILA assessments.
Reviewed and analysed the assessment returns = quantitative data. Split data by function and highlighted highest risk factors per function. Prepared materials for focus groups.		
Ran series of focus groups – one per function.		People were desperate to attend the focus groups – they became “all ticket” affairs! It was the first time they’d been asked to be involved in this way.
Shared the assessment data with focus groups and asked for reasons why certain factors had been rated as high risks.		People gave their feedback on the risk data – how change had happened in the past. Their comments were captured = qualitative data.

Change Agents (Us)	Sponsors	Adapters
Prepared presentation to leadership (sponsorship) team covering: <ul style="list-style-type: none"> • Key change implementation messages • Overview of the PCI approach • Purpose and content of assessment • Key findings including “bringing to life” with people’s comments <ul style="list-style-type: none"> • Importance of findings • Proposed actions 		
Presented to the leadership team and facilitated discussion.	The leadership discussed, revised and agreed the actions to move the implementation forward e.g. <ul style="list-style-type: none"> • appointing change agents for each function • clarification and communication of change purpose • sponsor assessment (feedback for themselves) • etc. 	

For more information see the *Conducting an Assessment* document on the PCI Tools page of this community site.