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North Carolina Procurement Transformation
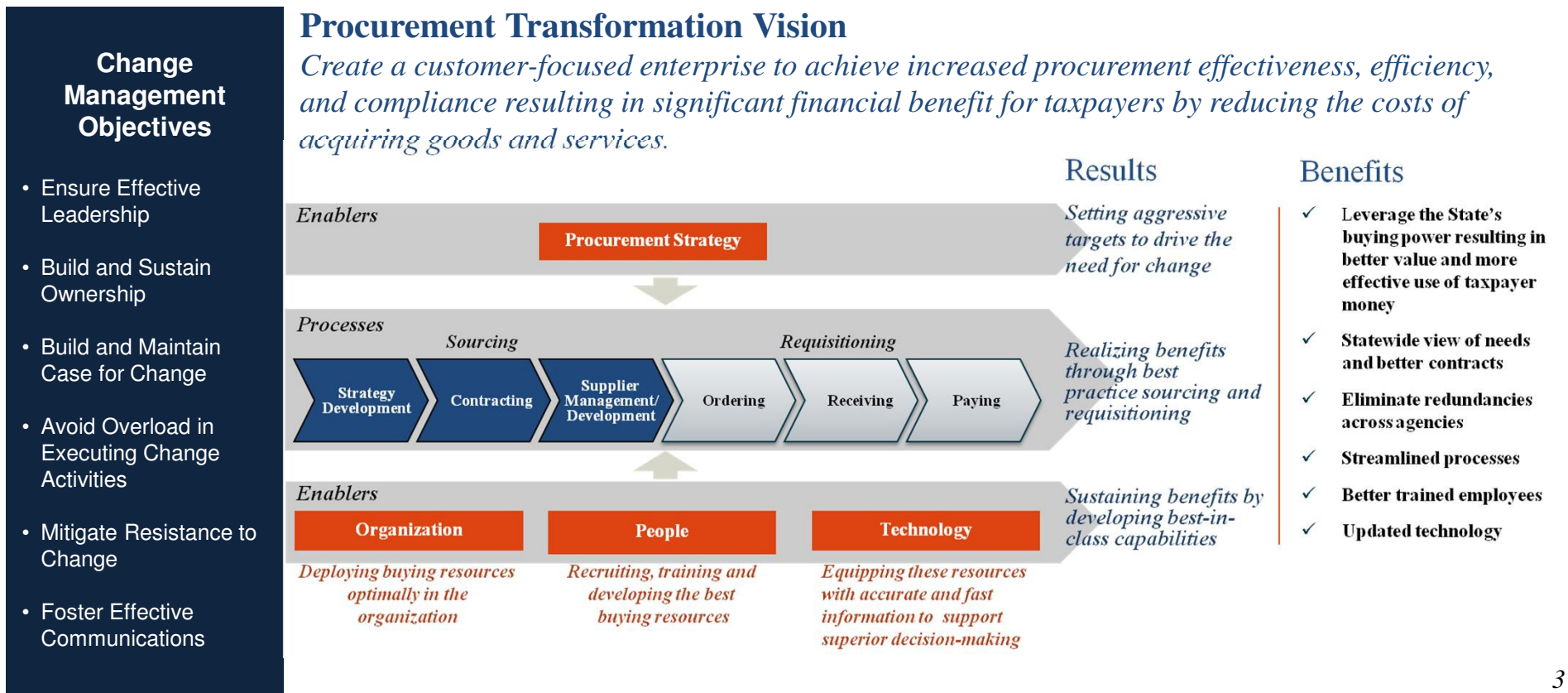
Change Management and
Communications Plan

April 8, 2011

- **Executive Summary**
- Integrated Change Management and Communications Approach
- Change Management Strategy and Plan of Activities
- Communications Strategy and Plan
- Communications Planning Timelines
  – Strategy & Governance
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Executive Summary

The Change Management and Communications Plan includes a strategy and framework to effectively engage stakeholders and communicate changes necessary across the transformation areas to achieve the desired results and sustain the benefits of the effort.

The goal of the change management and communications effort is to align executive leadership and build commitment, manage the changes, and enable the organizational transformation to support the complex process of implementing the approved recommendations in the Strategy & Governance, Organization, Sourcing, and Technology areas. Achieving the change management objectives helps the State more effectively implement the changes necessary to realize the vision for the transformation, achieve the desired results, and realize the long-term benefits of the program.

Change Management Objectives

- Ensure Effective Leadership

- Build and Sustain Ownership

- Build and Maintain Case for Change

- Avoid Overload in Executing Change Activities

- Mitigate Resistance to Change

- Foster Effective Communications

Procurement Transformation Vision

Create a customer-focused enterprise to achieve increased procurement effectiveness, efficiency, and compliance resulting in significant financial benefit for taxpayers by reducing the costs of acquiring goods and services.

Results

Setting aggressive targets to drive the need for change

Realizing benefits through best practice sourcing and requisitioning

Sustaining benefits by developing best-in-class capabilities

Benefits

- ✓ Leverage the State's buying power resulting in better value and more effective use of taxpayer money

- ✓ Statewide view of needs and better contracts

- ✓ Eliminate redundancies across agencies

- ✓ Streamlined processes

- ✓ Better trained employees

- ✓ Updated technology

Enablers — **Procurement Strategy**

Processes — Sourcing: Strategy Development → Contracting → Supplier Management/Development | Requisitioning: Ordering → Receiving → Paying

Enablers —

Organization
Deploying buying resources optimally in the organization

People
Recruiting, training and developing the best buying resources

Technology
Equipping these resources with accurate and fast information to support superior decision-making

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Executive Summary
– Change Management Recommendations

Change Management activities will enable leadership to gauge the readiness, willingness, and ability of organizations and employees impacted by Procurement Transformation to function in a new environment.

Change Management Recommendations:

- **Build Alignment and Leadership Commitment**

  – Implement the recommended Governance Model to support creating leadership alignment allowing program sponsors and State leadership to speak with a "single-voice" regarding the ongoing transformation effort and sustain the improved procurement function

- **Enable the Organization to Transform**

  – Implement the recommended Operating Model and supporting organizational structure to enable the procurement function's transformation and sustain changes necessary to achieve the vision

  – Implement the appropriate training and development programs to enable employees to succeed in the new operational environment

- **Manage the Change**

  – Closely align the change management effort with program leadership to assist in scheduling activities focused on identifying challenges based on the rate of change or the capacity for the organization/individuals to cope with the amount of change

  – Use a change management interaction model to select multiple and appropriate activities at any given point in time of the transformation

  – Implement a Change Network as a way to formalize peer-to-peer information sharing and support program communications, as well as, implement changes as a result of process or technology initiatives

  – Leverage various meetings and forums to share successes and leading practices, prepare individuals for upcoming changes, encourage participation in change efforts, and gauge adoption of and/or resistance to specific changes

  – Use both Change Readiness Surveys compared to the results from the baseline survey and other short readiness surveys to monitor watch areas, gauge readiness for specific initiatives, and identify issues

Executive Summary – Communications Recommendations

The design and implementation of an effective communications program is critical to the success of the Procurement Transformation.

Communications Recommendations:

- **Managing Communications**

  - Consider communications best practices when developing and delivering all communications

  - Use a cascading communications approach to align messaging and leverage existing communications vehicles/channels throughout the organization

  - Implement an efficient process to review and approve all communications to allow for timely information sharing and mitigate the potential for information overload for employees involved

  - Use a single Communications Tracker as the primary mechanism to schedule, track, and de-conflict formal communications in order to logically leverage multiple communications channels and minimize redundancy and information overload for stakeholders

  - View communications is an iterative process which must be continually monitored using various feedback mechanisms to gauge the effectiveness of messages

- **Communications Vehicles and Format**

  - Continue to use the website created during the Assessment to communicate Fact Sheets, standard program briefings, Frequently Asked Questions (FAQs), and post links to related information, e.g., Administrative Code, pending legislation

  - Create two standard communications vehicles—a Procurement Transformation Postcard and a Procurement Transformation Update—to "push" information to targeted stakeholder groups

  - Use formal memos from leadership to both State and procurement function audiences for formal announcements, to establish policy, and periodically provide updates on progress of the transformation and supporting activities

  - Use the official templates to create a program identity and support consistent communications

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Integrated Change Management and Communications Plan

An Integrated Change Management and Communication Approach effectively builds stakeholder engagement by proactively executing change activities and carefully managing communications across a transformational project.

Integrated Change Management and Communication Approach

Gather Input	Develop Strategy	Plan	Execute
Input is gathered from available means to form the basis for the change management and communications strategy	Leading practice change management and communications practices adapted to meet the needs of the transformation effort	The strategies are used to develop an integrated set of activities	Activities are executed and the plans are updated based on feedback

Feedback Loop

Stakeholder Map
Analysis to define stakeholders and their needs and concerns relating to the program; identifies the level of impact the program will have on the stakeholders and the key messages to address their needs
(see Appendix for Stakeholder Summary)

Change Readiness Survey Report
Highlights the degree of readiness measured in six (6) dimensions
- Vision and Leadership
- Action and Alignment
- Adaptability and Change
- Involvement and Collaboration
- Training and Performance Management
- Communications
(see Appendix for Executive Summary)

Survey Discussions

Change Management Strategy

The Change Management Strategy outlines the approach, guiding principles, and types of activities used to support the transformation.

Communications Strategy

The Communication Strategy outlines the approach and communication principles used for planning communications

Change Management Plan

The Change Management Plan is a living document outlining recommended change management activities by timeframe, audience, key drivers and outcomes, and recommended interventions.

Communications Plan

The Plan is a living document outlining communications activities by timeframe, audience, key messages, recommended vehicles, and development/sender responsibilities.

Integrated Plan and Execution

The Change Management and Communications Plans are integrated into an actionable plan which efficiently and effectively implements the change management and communications strategies to support the transformation.

Feedback Loop

Integrated Change Management and Communications – Managing up the Commitment Curve

Effective execution of the change management and communication plan will allow the State to gain commitment for the changes necessary and sustain the benefits of the transformation.

The Procurement Transformation journey combines Strategic Sourcing <u>with the development of procurement capabilities to sustain the benefits over time.</u>

Benefits / Time

Full Procurement Transformation

Enabled Strategic Sourcing

Traditional Strategic Sourcing

As-Is Procurement
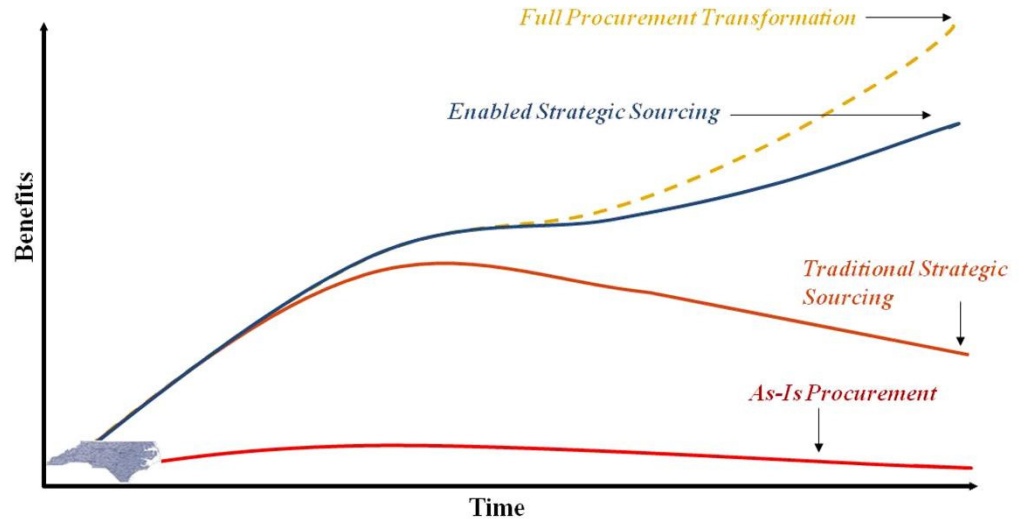
THE CHANGE COMMITMENT CURVE

Degree of Involvement & Ownership Required

Build stakeholder involvement and ownership by generating awareness, understanding, buy-in, commitment, and action within DOA and agencies

Action
Participates in facilitating change
Attends training
Changes behavior or procedures to support process changes

Commitment
Articulates the change as norms
Articulates personal ownership of the change

Buy-in
Works toward change
Invests time in change
Articulates commitment to goals of change

Understanding
Accepts nature and intent of change

Awareness
Encounters change
Realizes change is imminent

Elapsed NC Procurement Transformation Schedule

Program leadership and sponsors leading the transformation must move up the Commitment Curve—from Awareness through Commitment—more quickly than others in the organization.

Integrated Change Management and Communications – Change Levers

Leadership sponsorship and alignment, changes in systems and processes to support the transformation, and involvement of employees closest to the impacted operations at the appropriate time will result in the most sustainable results.

A number of activities can be leveraged to support the transformation of North Carolina's procurement function:

- Executive Sponsorship
- Operating Model
- Organizational Alignment
- Stakeholder Management
- Change Readiness
- Communications and Engagement
- Workforce Management
- Training and Performance Support

Recommendations contained in the Strategy & Governance, Organization, Sourcing, and Technology Benefits Cases and Implementation Plans, set the foundation for changes required to transform the current procurement function into a statewide system guided by a single strategy and a senior leadership team with the broader view of procurement operations. The changes need to be supported by complementary technology, policies, processes, and skilled employees.

Change Leadership
Systems and Processes
Risks and Roadblocks
Passion and Drive
Involvement
Disturbance
Vision and Direction
Management Skills
Communication
Training and Information
Accountability

Source: ChangeTrack Research (R2=0.482, N=41725)

High negative   High positive

Relative importance of factors that drive improvement in business performance

Research has shown traditional change management activities – training and communications – are the least impactful in driving improved business performance through change efforts.

They are, however, invaluable in creating feedback loops to gauge awareness and employees ability to function in the new environment.

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Integrated Change Management and Communications – Managing Expectations and Risks

The State must pay particular attention to possible risks most affecting the transformation and proactively manage the change to support the long-term success of the effort and institutionalization of the changes across the statewide procurement function.

Risks	Mitigation Strategy
• Business benefits are not well understood by whole organization, potentially including the both the executive and legislative branches of state government, the Executive Steering Committee and Procurement Governance Team, and employees directly involved in the procurement function.	✓ Continue to verify business benefits with Executive Steering Committee and Procurement Governance Team ✓ Managers to assist in building and validating metrics for balanced scorecard reporting ✓ Managers to communicate and reinforce long-term benefits to employees ✓ Identify other change activities and measure the impact
• Change will be limited to a single area, e.g., technology system or sourcing activity, as opposed to a comprehensive approach that will sustain the new operating model • Other change activities will divert focus from Procurement Transformation • Impact of other change activities hasn't been measured	✓ Alignment between program leadership and the Executive Steering Committee on goals and initiatives to complete the transformation ✓ Procurement Governance Team to sign off on newly developed processes ✓ Program team to monitor expectations and develop metrics to communicate progress ✓ Regular stakeholder updates by the program team
• Inadequate communication to external stakeholders e.g., suppliers, LEAs, local governments, universities • Internal communications not delivered or inconsistently delivered by managers • Written communications not read	✓ Open lines of communication between leadership, the program, management, and employees ✓ Audit change management and communication effectiveness through Readiness Assessments ✓ Communication delivery via multiple channels and updated to meet information needs based on feedback

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Change Management Strategy and Plan of Activities

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Change Management is the process by which we prepare people and the organization for changes needed to implement a new business capability or change to the organization, processes, and procedures to deliver existing capabilities in a new way. Specific activities include:

- Planning for the change to occur in the organization

- Building executive leadership and commitment to ensure the vision and target state are clearly articulated and understood by all

- Transforming the way people work to ensure they adopt and own the new processes, technology, and ways of working associated with the change effort

- Managing change to equip the organization to respond positively to the change effort

Change Management activities will enable leadership to gauge the readiness, willingness, and ability of organizations and employees impacted by Procurement Transformation to function in a new environment in which change efforts fundamentally alter how the organization is structured, the roles and responsibilities of the workforce, the policies, processes, and procedures to carry out the procurement of goods and services, and how performance and success are measured.

Proactive change management activities—key to executing a successful transformation—enable the State to realize the potential benefits by:

- Planning, guiding, and supporting the implementation process
- Anticipating and addressing potential impacts of the change
- Anticipating and addressing potential resistance to change
- Enabling the workforce to perform successfully in the new environment
- Creating ways to sustain new processes and continuously improve operations

The Change Management Plan provides a way for leadership to integrate and synchronize activities, measure progress, take action as required, and generally keep activities aligned with the program plan and goals of transformation and maintain the momentum of the effort. It includes ways to assist program leadership:

- Establish targets and milestones
- Conduct ongoing assessments
- Anticipate risks
- Build on early successes
- Identify changes in context, complexity, or scope
- Plan parallel and future work
- Adjust and realign priorities, performance targets, and resources

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Change Management – Approach

The Change Management team should provide alternatives and mitigation strategies to support the needs of the program and help management and employees uncover and work through the underlying causes of resistance over the course of the transformation effort.

Recommendation: The Procurement Transformation change management effort should be closely aligned with program leadership to assist in scheduling activities. The focus should be on identifying challenges based on the rate of change and the capacity for the organization/individuals to cope with the amount of change.

On-going change management efforts to support the successful transformation of procurement across the state of North Caroline should include:

- **Using a change management interaction model** to select multiple and appropriate activities at any given point in time of the transformation
- **Implementing a Change Network** as a way to formalize peer-to-peer information sharing, support program communications, and implement changes as a result of process or technology initiatives
- **Leveraging various meetings and forums** to share successes and leading practices, prepare individuals for upcoming changes, encourage participation in change efforts, and gauge adoption of and/or resistance to specific changes
- Using both the baseline Change Readiness Survey and other short readiness **surveys to monitor watch areas, gauge readiness for specific initiatives, and identify issues and risks**

Alignment in the changes to the organization, processes, systems to support the transformation, and involvement of employees closest to the impacted operations at the appropriate time will result in the most sustainable results.

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Change Management – Sample Team Structure

The change management effort should be closely aligned with program leadership and support the implementation teams.

NC Procurement Transformation Program Manager

For their respective areas, the FTEs will enable and support communications, change management, and training functions embedded in and executed by the Sourcing, Technology, and Strategy & Governance / Organization teams.

- Workstream Planning and Execution
- Cross-Workstream Change Strategy and Planning Activities
- Change Readiness Assessments

- **Key Skills Required:**
  - Transformational Change Management
  - Program/Project Management

Change Management and Communications Team Lead — 1 FTE

Sourcing Lead

Technology Lead

Strategy & Governance and Organization Lead

Communications Lead — 1 FTE

Change Management Lead — 1 FTE

Training Design and Delivery Lead — 1 FTE

- **Core skills required for all team members:**
  - Change Management
  - Oral and Written Communication
  - Business Readiness
  - Facilitation
  - Teamwork and Collaboration

- Change Management and Training Design and Delivery teams will assist in developing communications and supporting stakeholder engagement activities.

Communications Lead

- Communications and Stakeholder Engagement
- Business Readiness Communications
- Change Networks

- **Key Skills Required:**
  - Communication and Messaging
  - Communications Planning and Management
  - Stakeholder Engagement

Change Management Lead

- Change Strategy and Activities
- Change Readiness Assessments
- Change Networks
- Assist with Strategy & Governance
- Assist with Organization Management Processes

- **Key Skills Required:**
  - Stakeholder Engagement
  - Executive Presence
  - Business Acumen
  - Survey Design and Analysis
  - Risk and Issue Management

Training Design and Delivery Lead

- Training Strategy and Role-Based Training/Competency Development Planning
- Training Design Standards
- Assist in Process/Procedure Development
- Training Delivery Planning

- **Key Skills Required:**
  - Training and Performance Support Design and Development
  - Training Scheduling

Note: FTE estimates for Change Management and Training may be phased in and increase based on the number of concurrent transformation initiatives. The leads would be responsible for coordinating the designing, developing, and scheduling across the entire program and support change management and training activities embedded in the workstreams.

Change Management – Interaction Model

Program leadership has access to a wide variety of interaction options to engage stakeholders throughout the transformation effort.

Recommendation: Use multiple types of interactions with stakeholders to reinforce new operating model and expected behaviors.

The program team should consistently anchor communications, training, and other activities to the vision, goals, and context of the overall transformation initiatives and timelines to reinforce the alignment of the changes and support individuals' discovery of "what's in it for me?"

Vision and Leadership & Communications

Individuals responding to the baseline Change Readiness Survey indicated they understand why procurement needs to change, but generally disagree leadership is attempting to involve employees in the change.

Respondents also indicated E-mails, Website, Face-to-Face Meetings, Staff Meetings, and Conference Calls are their preferred communications channels.

Communications
- All Hands Meetings
- E-mail
- Briefings
- Website
- List Serve
- FAQs
- Fact Sheets

Training & Performance Support
- Instructor-Led (Classroom)
- Instructor-Led (Virtual)
- Web-Based
- Job Aids
- Specialized Training

Change Network
- Peers
- Team Leads
- Change Agents

Other Support
- Manuals
- Procedures
- Swat Teams
- Expert Coaching

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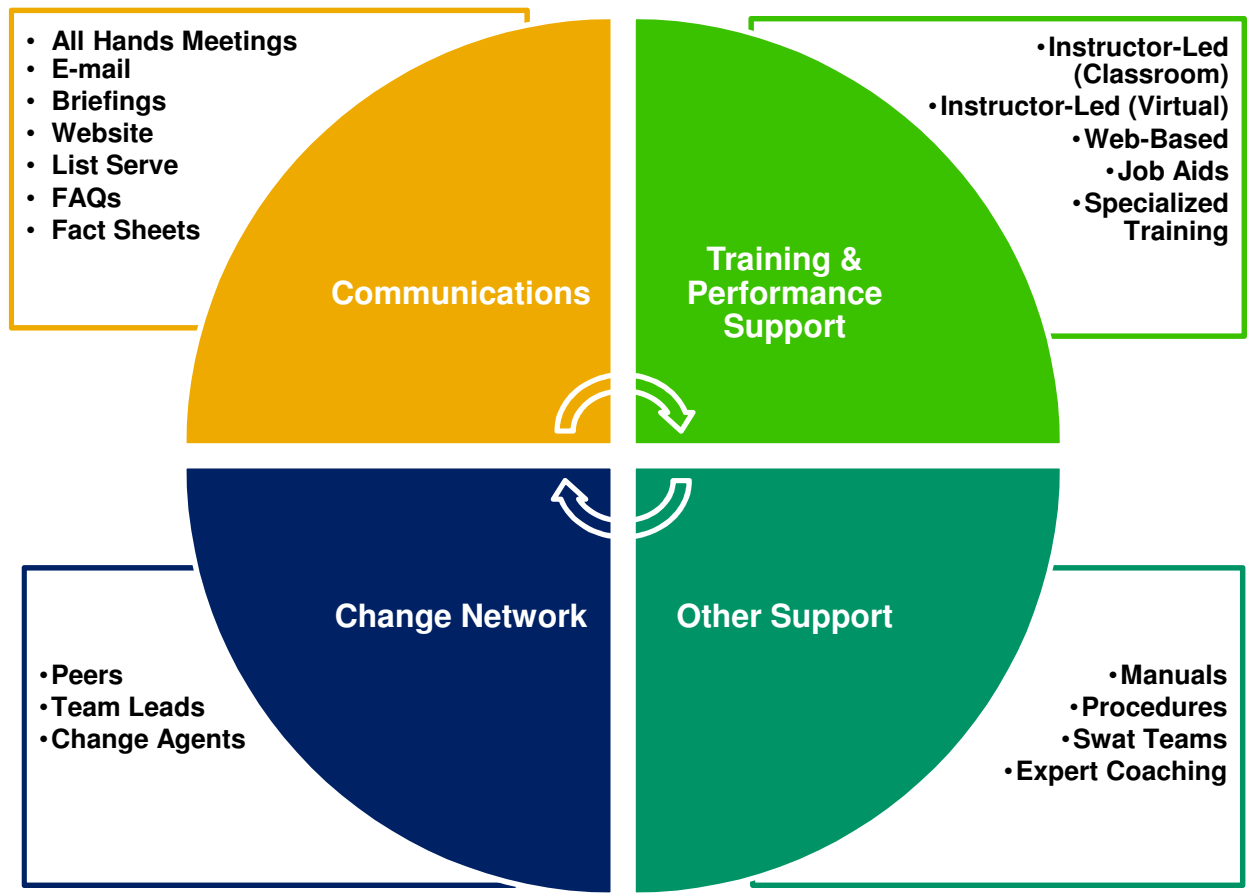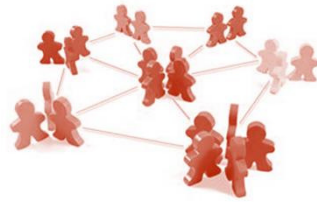
Change Management
– Change Network Approach

Recommendation: The State should implement a Change Network made up of employees from across the procurement function –known as Change Agents – to share information and solicit participation in various initiatives as part of Procurement Transformation.

Objectives:	Benefits:
• Create a more "personalized" communication channel to support change throughout impacted organizations • Provide method to more directly influence stakeholders and teams in the field • Allow project team to better penetrate the organization and reach areas of need or concern • Build momentum along the change curve through clear and consistent expectations • Create a strong line of communication back to the program team to assess progress, issues and risks	• Provides positive role models to demonstrate commitment to the change effort • Provides an employee perspective on the change effort. • Maximizes movement along the change curve by providing readiness and acceptance input • Reduces resistance through active leadership and employee involvement • Enables a faster, better, and smarter implementation of changes. • Increases effectiveness & trustworthiness of messages through respected peer delivery

This network is used to augment the formal management structure and leverages the informal network of individuals across the State to provide an additional communications channel, as well as a feedback loop to identify gaps in information and risks in overwhelming individuals with the degree of change. Change Agents selected to be part of the network should:

- Possess critical thinking skills and ability to make recommendations considering the needs of the State and individuals impacted
- Deep understanding of their business function, process area, project team, etc.
- Strong organizational and leadership skills
- Comfortable communicating to groups and interacting with senior leadership
- Respected and trusted by peers and/or in a leadership position
- Capable of openly discussing transformation-related risks & issues with leadership, peers and the program team
- Resourceful in resolving and escalating issues
- Positive and proactive outlook on their work
- Ability to balance the role of Change Agent along with their current responsibilities

Involvement and Collaboration
A significant number of respondents to the baseline Change Readiness Survey indicated they have an informal network which includes people from various agencies.

Respondents also indicated working with people in other functional areas is effective, however, cooperation in making changes is challenging.

Change Management – Change Agents

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As part of the Change Network, Change Agents help bridge the gap between leadership and employees playing a a key role in helping move impacted employees to the desired level of commitment through clear and consistent information and materials.

Employees are more willing to accept change when they:

- **Understand what is changing and how they are impacted**
- **Understand the context and necessity for change**
- **Are provided the necessary information, tools, and/or skills**
- **Receive clear and consistent communications**

Identification of change resistance characteristics is critical to understanding and planning of future efforts. Resistance to change is common among large scale change efforts like Procurement Transformation. Change Agents can assist in identifying and resolving possible resistance to the transformation effort:

- **Lack of Motivation** – need for transformation unclear or no personal sense of urgency
- **Big Picture Not Understood** – is only a partial understanding about what is changing
- **Perceived Loss of Personal Control** – impacted individuals have little or no involvement
- **Loss of Stability** – high levels of uncertainty regarding the future expectations of jobs, roles, and required skills
- **Inadequate Communications** – communications are untimely, outdated or unfocused, and provide few details and little direction
- **Expectations Not Met** – expectations about communications and personal interactions unmet

- Change Agents need to move up the change curve before the broader employee/end user groups to help drive the change effort and bring remaining users to desired levels.
- Commitment targets will vary for different impacted groups, e.g., target for External Stakeholders is typically at Understanding as they are not directly affected
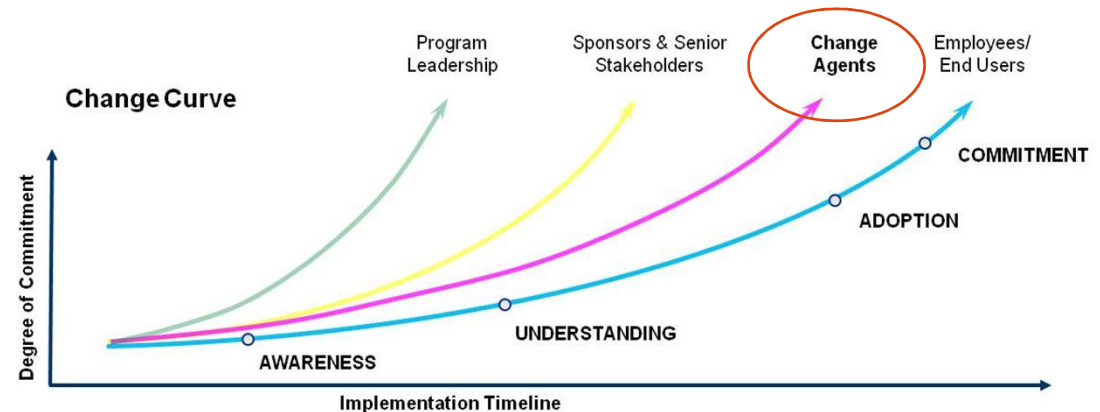
Change Management – Change Agent Interaction

The Change Network is structured to cascade sponsorship from executives to employees impacted by initiatives under the Procurement Transformation program. This focus is to build understanding and momentum for the transformation.

Change Management & Communications

- Build Change Network
- Coordinate and coach Change Agents
- Provide clear and consistent information and materials
- Receive feedback and utilize feedback for future activities

Continuous Feedback Loops

Program Governance
(Executive Steering Committee, Advisory Committee, Sponsors)

- Set program vision, define changes and priorities.
- Allocate resources / support and provide project guidance.
- Publicly demonstrate commitment to outcomes and validate change effort.

Change Agents

- Accountable for facilitating change within their organizations
- Surface issues/concerns; work with program to resolve
- Develop deep understanding of the transformation
- Communicate transformation messages
- Provide support and encouragement to employees
- Provide feedback!

Employees Impacted by Changes

- Listen to/read communications
- Ask questions and identify issues
- Understand / accept changes
- Groups could be end users of a system, process owners and/or employees directly impacted by transformation activities

Change Management
– Sample Change Network Implementation

The Change Network uses regularly scheduled meetings with a standard format to provide an alternative communications channel to share information and a forum for employee involvement to solicit valuable feedback from employees regarding focused initiatives.

To maximize the benefit, regular meetings/conference calls may include participants from all phases (*in some cases, the Change Agent may be the same person*) to share general information to build awareness. These regular Change Network meetings may need to be augmented by meetings/communications specific to the focus of each phase.

Month 0	Month 6	Month 12	Month 18	Month 24 and beyond

Change Network – Phase I (Strategic Sourcing Focus)

- **Who –** Representative users from current P&C and IT Procurement organizations, state agencies, and community colleges
- **What –** Assist in fully understanding opportunities for strategic sourcing categories; communicating priorities and activities
- **When –** Solicit nominations and begin participation in regular calls concurrent with kick-off of Strategic Sourcing Activities

Change Network – Phase II (State Procurement Organization Redesign)

- **Who –** Representative users from current P&C organization, state agencies, and community colleges
- **What –** Act as POC's for their respective organization with respect to communicating the changes to State Procurement, the impacts organizations, and raising risks/issues to inform decisions/activities
- **When –** Participation in network activities to begin concurrent with decision to implement the recommended State Procurement organizational structure

Change Network – Phase III (Ariba Upgrade)

- **Who –** Representatives from current P&C organization, state agencies, community colleges, LEAs, and other users of E-Procurement
- **What –** Act as POC's for their respective organization/project with respect to the changes to the system due to the upgrade; potential to solicit participants in testing the system prior to go-live, and provide feedback
- **When –** Participation in network activities will begin concurrent with agency readiness activities begin to prepare users for the upgrade release

There are usually four (4) activities over a 30-day period prior to starting a new phase of the Change Network:

- Initiate Change Agent nomination process
- Begin Change Agent confirmation process
- Finalize list of Change Agents
- Conduct Phase kick-off activities

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Change Management
– Conference Calls, Staff Meetings, and Roundtables

Recommendation: Conference calls, staff meetings, and the continued use of Roundtable discussions should be leveraged to share information, help prepare individuals for planned changes, create understanding about new operating model concepts, and build acceptance and ownership among impacted stakeholders. The Roundtable format could be repurposed to focus groups supporting action learning or process improvement efforts on highly impacted or complex areas of the transformation initiatives.

To support consistent messaging and effective meetings, agendas, facilitators, and appropriate attendance by impacted stakeholders will increase the likelihood of collaboration and cooperation in making the needed changes across the procurement function.

Procurement Transformation Roundtables

☑	**Strategic Sourcing: Putting the "Strategy" into Sourcing**	Jan 20
☑	**Contract Management: Leading Practices**	Feb 3
☑	**Reporting: Spend and Market Analysis**	Feb 17
☑	**Supplier Relationship Management**	Mar 3
☑	**Technology: Leading Practices in Procurement**	Mar 17
☑	**Adding Value: The Voice of the Customer**	Mar 31
☐	**Best Value Method of Contracting**	Apr 14
☐	**The Procurement Function: Organized for Success**	TBD

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Change Management – Change Readiness Survey

Recommendation: Assessing the readiness for change throughout the Procurement Transformation effort should be accomplished periodically throughout the transformation using the initial Change Readiness Survey results as a baseline. Additional short readiness surveys should be used to monitor watch areas, gauge readiness for specific initiatives, and identify risks and issues.

The baseline Change Readiness Assessment highlighted the degree of readiness for DOA and other executive agency stakeholders and community college employees involved in the procurement function to change or serve as sponsors of change. The analysis of the responses provided the State and the project team with:

- Information about each agency's procurement/change history and current aptitude for change
- Potential barriers to successful change implementation
- An ongoing assessment method to monitor and react to people's readiness for change

Continuing to monitor results of readiness surveys provides quantitative and qualitative assessments to understand behavioral patterns and attitudes across the target groups in order to more effectively design and deploy change management strategies and interventions to support Procurement Transformation. Since stakeholder groups will be impacted differently by various approved initiatives, core survey questions should be augmented by demographic questions in order to better understand specific concerns or challenges.
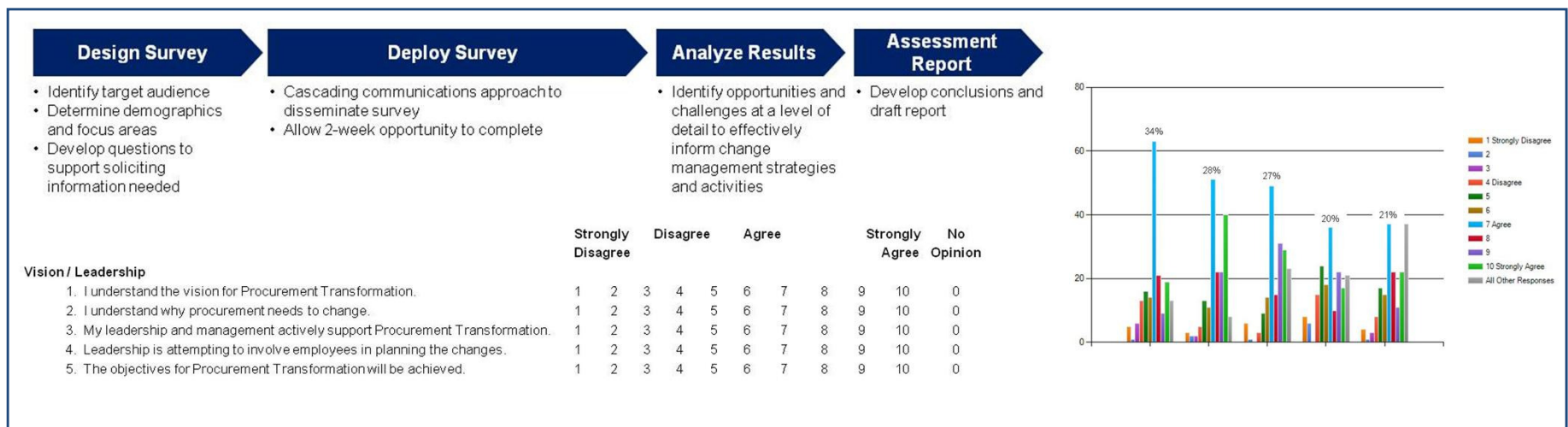
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Communications Strategy and Plan

The design and implementation of an effective communications program is critical to the success of the Procurement Transformation. The communications program combines the outcomes of the Stakeholder analysis and the Change Readiness Survey results to document both the Communications Strategy and the Communications Plan.

The Communications Strategy is part of a coordinated change management effort to ensure sufficient support for the new changes from all stakeholders. It outlines the focus and intent of the overall communications efforts to be used in order to keep the stakeholders informed of, involved in, and committed to the Procurement Transformation. It also outlines the approach and guiding principles to be used for planning communications activities. It defines key stakeholders/audiences, key messages about the transformation and supporting activities, existing and new communications channels/vehicles, and high-level processes to manage the communications effort. At a high level the Communications Strategy:

- Outlines the communication objectives and guiding principles
- Describes the relationship between communications and sponsorship
- Broadly defines stakeholder groups and the purpose of communications with each group
- Identifies the communications approach, including the use of cascading communications
- Defines risks related to and/or mitigated by communication

The Communications Plan is a living document outlining communications activities by timeframe, audience, key messages, recommended vehicles, and development/sender responsibilities. Communications activities support stakeholder engagement across the broad sets of groups including leaders sponsoring transformation activities, the teams actively engaged in developing and implementing the changes, employees engaged in maintaining the procurement services throughout the transformation, and the customers and constituents of those services.

Note: Recommendations have not yet approved for implementation by the State. This baseline planning framework will need to be updated to support the change management and communications efforts and timelines based on the State's decisions and schedule going forward.

The program-level communications planning presented in this document should be updated based on decisions and timelines for the specific initiative(s). Additional planning will be required during implementation to outline targeted communications necessary for the workstream(s) to execute their responsibilities. Once decisions are made, a single integrated timeline will be useful in identifying integration points across the various transformation initiatives and specific change management activities and communications .

Communications – Framework

Category	Stakeholder Group	Communications Purpose	Owner(s)
External	Public/Taxpayers	**Inform – Connect – Engage – Equip** • Inform stakeholders outside of the procurement function—and outside of state government as applicable—about the organizational, process, and technology changes and provide details about the impact to them and/or gain buy-in on scope, timeline, and expected outcomes.	• Project Leadership • DOA/P&C • ITS/IT Procurement • DOA Communications
	Vendors		
	Associations		
	Media		
Government Agencies	Legislature		
	Local Government		
	Community Colleges		
	Local Educational Agencies		
	University System		
	Executive Branch Agencies		
Employees	Procurement function employees	• Inform internal stakeholders of organization and system/process changes, communicate timelines, and provide training and change support.	• Executive Leadership • Agency Leadership • DOA/P&C • ITS/IT Procurement
	Employees receiving goods and services		
Leadership	Executive Leadership	• Provide status updates and project scorecards /progress to executives and committees. • Request assistance in removing barriers to change.	• DOA and Project Leadership
	Executive Steering Committee		
	Executive Agency Leadership		
	Advisory Committee		
Project Team	Agencies and employees directly involved in executing project activities including people, process, and technology implementation	• Set a common vision and context for the project; communicate progress and objectives to manage key areas, e.g., issues, risks, change control.	• Project Leadership

Communications – Key Messages

* The program team will enable owners to communicate key information by providing materials, including briefings, memos and fact sheets to ensure consistency in messaging. The team will leverage subject matter expertise to create targeted information needed by the owners. Owners may leverage forums or other individuals to deliver targeted messages.

Category	Stakeholder Group	Impact	Key Messages	Owner(s) *
External	Public/Taxpayers	Low	• Expected and actual savings / benefits for the taxpayer • New technology solutions / processes for vendors • Major initiatives, e.g., sourcing • Updates on progress; next steps	• Program Leadership • DOA/P&C • ITS/IT Procurement • DOA Communications
	Vendors	Medium		
	Associations	Low		
	Media	Low		
Government Agencies	Legislature	Low	• Changes in organization, processes, technology • Expected and actual savings / benefits • Benefits of using state term contracts • How to use new / upgraded technology • Updates on progress; next steps	
	Local Government	Low		
	Community Colleges	Medium		
	Local Educational Agencies	Medium		
	University System	Low		
	Executive Branch Agencies	Varied		
Employees	Procurement function employees	High	• Changes in organization, processes, technology • How to use new / upgraded technology • Updates on progress; next steps • Requests for participation / outcomes of initiatives	• Executive Leadership • Agency Leadership • DOA/P&C • ITS/IT Procurement
	Employees receiving goods and services			
Leadership	Executive Leadership	Medium	• Changes in organization, processes, technology • Milestones and program plans • Updates on progress; next steps • Expected and actual savings / benefits • Impacts to operations	• DOA and Program Leadership
	Executive Steering Committee			
	Executive Agency Leadership			
	Advisory Committee			
Project Team	Agencies and employees directly involved in executing project activities including people, process, and technology implementation	High	• Milestones and program plans • Rationale for sequencing initiatives • Updates on progress; next steps	• Program Leadership

Communications
– Risks and Mitigation Strategies

As the State moves forward with Procurement Transformation activities, there are risk areas leadership and program management should continually watch for and put in place mitigation strategies to counter the negative impacts.

Area of Risk and Description	Probability of Occurrence	Mitigation Strategy
Inconsistent Implementation - Inconsistent interpretation of implementation changes	High	Promptly identify and report on policy and operational inconsistencies to team leads; ensure clarifying information is provided
Stakeholder Resistance - Stakeholders do not support the changes and reject or ignore the changes, including participation in sourcing activities, process	Medium-High	Understand how people may be disrupted and work to build support structure in advance of disruptions; clearly communicate benefits of the change; engage steering committee leadership to create incentives to change behaviors
Timing and Sequencing of Messages - There are several potential work streams with messages that need to be sent at various timeframes to the same groups of stakeholders	Medium - High	Integrated program level project plan and clear roles and responsibilities; hold integration meetings across the program to plan communications; maintain a 1-3 month view of planned communications to effectively alert leadership of upcoming events/leverage points
Premature Leakage to External Stakeholders – Letting the possible options be known prior to decisions being made potentially complicates the issues being discussed and leaves the program open to increased scrutiny	Medium	Create positioning messages both internally and externally – e.g., Procurement is taking proactive steps to better meet changing requirements; proactively communicate with stakeholder groups; actively manage the sequencing of messages
Lack of Sponsorship and/or Support - Efforts not supported by key champions within key stakeholder groups	Medium	Identify and continuously communicate with key potential champions
Lack of User Buy In - Users not paying attention to messages; not following up on actions	Medium	Early user engagement via demos, roadshows, conference calls and targeted leadership messages; use of the Change Network
Inconsistent and Conflicting Messages - Messages which don't support the overall implementation objectives	Medium	Review all communications for clarity and consistency; ensure appropriate senders are identified to ensure credibility of the communication; develop standard key messages and talking points
Communication Overload - Too many separate communications	Low	Ensure the Communications Plan is integrated; leverage integrated messaging; maintain a 1-3 month view of planned communications to effectively alert leadership of upcoming events/leverage points
Communications Contacts not Supportive of Change - Key communications leads we must work with in operating units, State functions, and program leadership	Low	Engage points of contact early in the process; understand and adhere to their development-delivery process wherever possible.

Communications – Approach

Effective communications supports the coordinated change management effort by making the appropriate information available to stakeholders at the appropriate time to enable change. Actively managing the communications supports stakeholder engagement and will help leadership and program management align key messages about the transformation activities.

- An effort as complex as Procurement Transformation requires effectively and efficiently managing communications:

  - **Communications best practices** should be used when developing and delivering all communications

  - Combine **high and low touch communications** to support a **cascading communications approach in aligning messaging** and leveraging existing communications vehicles/channels throughout the impacted organizations

  - An efficient **process to review and approve all communications** is needed for timely information sharing and mitigate the potential for information overload for employees involved

  - **A single Communications Tracker** as the primary mechanism to schedule, track, and de-conflict formal communications is required to logically leverage multiple communications channels and minimize redundancy and information overload for stakeholders

  - **Communications needs viewed as an iterative process** which must be continually monitored using various feedback mechanisms to gauge the effectiveness of messages

- Using various communications channels, types, and formats vehicles will increase the likelihood of messages being received by the intended stakeholder group(s):

  - Continue to **use the website created during the Assessment** to communicate Fact Sheets, standard program briefings, Frequently Asked Questions (FAQs), and post links to related information, e.g., Administrative Code, pending legislation

  - **Create two standard communications vehicles**—a Procurement Transformation Postcard and a Procurement Transformation Update—to "push" information to targeted stakeholder groups

  - **Use formal memos from leadership** to both statewide and procurement function audiences for formal announcements, to establish policy, and periodically provide updates on progress of the transformation and supporting activities

  - **Use the official templates** to create a program identity and support consistent communications

Communications – Objectives and Principles

Consistency and alignment of messages is essential to building the stakeholder trust and support for the transformation.

Recommendation: The following communications best practices should be considered when developing and delivering all communications supporting the Procurement Transformation change initiatives.

Communications Objectives

- Provide awareness and understanding messaging
- Reduce resistance through sharing information and help create ownership for the success of the program/change
- Build credibility of the initiative and minimize rumor mill communications
- Set and align realistic stakeholder expectations of the requirements and process to "get ready" for implementation
- Provide actionable steps to obtain involvement from sponsors and key stakeholders
- Address stakeholder concerns and generate ideas for mitigating risk and resistance
- Reduce the risk of potential business disruptions at start-up and beyond
- Communicate feedback regarding how to improve the program execution and communications
- Celebrate milestones, success and achievements

Communications Principles

- Speak with "one voice" – facilitate easy delivery of a consistent message through appropriate mediums and delivery sources
- Keep messages simple – provide relevant, accurate, timely, appropriate and consistent communications—avoid jargon
- Put emphasis on face-to-face communication and high involvement and engagement of stakeholders at all levels to cascade information throughout the organization
- Clearly define expectations for those impacted by the change
- Clearly define and communicate benefits; but don't "over sell"
- Enable quick identification and removal of barriers to resolve issues
- Ensure project milestones and target audience drive communications
- Use simple feedback mechanisms to assess user understanding of messages and to provide opportunity for two-way communications
- Use the Change Network to increase a sense of ownership among stakeholders and leverage it as a feedback mechanism
- Define metrics or mechanisms to measure communications effectiveness

Communications – High and Low Touch

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Recommendation: Use a combination of high and low touch communications to increase the effectiveness of targeted stakeholder messaging.

- All communications will leverage the same key messages—adapted for specific target audiences and the intended outcomes of the communications.

- There are several vehicles and mediums in place today which will be leveraged to help move stakeholders along the commitment curve.

- A cascading communications approach is necessary to deliver messages to different stakeholder groups to both provide information when it's needed and as a way to build ownership.

High Touch Communications
- Individual Discussions
- Meetings
- All Hands
- Town Halls
- Change Network

Procurement@doa.nc.gov
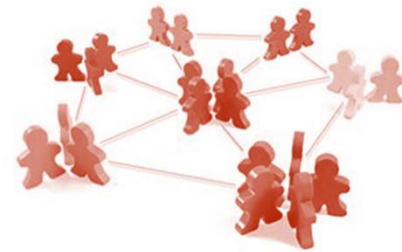
Low Touch Communications
- Website
- E-mail
- Newsletters
- Memos
- Briefings/Presentations
- FAQs

Communications – Cascading Approach

Recommendation: Based on the scope of the changes as a result of the Procurement Transformation and diversity of the impacted stakeholders across the State, a cascading communications approach is necessary to align messaging and leverage existing communications vehicles/channels throughout the organization.
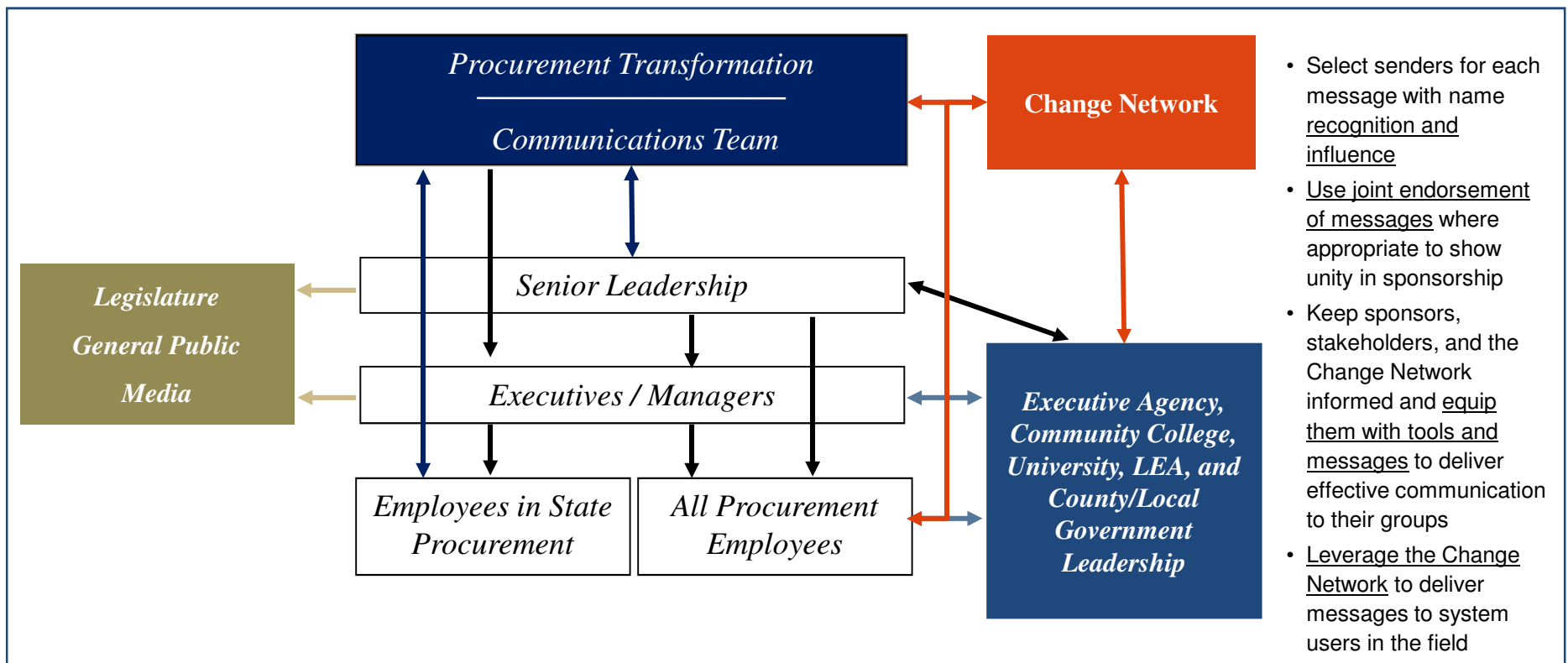
Included in this cascading approach is the ability of the Communications Team to leverage existing communications channels, as well as program and existing change networks throughout the organization. Use of the various channels will depend on the audience and intent of the message. *More than one channel should be used to reinforce key messages.*

Communications – Strategy and Sponsorship

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Communication and Sponsorship are tightly interwoven and occur simultaneously. Leadership must proactively support and communicate the benefits of the transformation.

Recommendation: Implement the recommended Governance Model to enable leadership alignment allowing program sponsors and State leadership speak with a "single-voice" regarding the ongoing transformation effort and sustain improved procurement strategy and operations.

In order to ready the State for the upcoming changes, employees across the procurement function and external stakeholders must know leadership is in alignment on the key changes necessary for success of Procurement Transformation.

For example –
- Sponsor will deliver select communications
- Feedback from sponsors will help modify and improve planned communication events
- Based on feedback received from the communications channels, increased sponsorship may be needed in select areas

Communications
Deliver key messages at appropriate times, using effective vehicles, and collecting feedback to address concerns

Sponsorship
the network of leaders and champions who will help drive the change

Vision and Leadership & Communications

Based on the results of the Change Readiness Survey, there is a significant gap in communicating the vision and objectives of Procurement Transformation.

Overall, individuals indicated they understand why procurement needs to change, but generally disagree leadership is attempting to involve employees in the change.

Only 50% of all respondents think the vision for transformation has been well communicated and a significant number of responses indicate there is an issue with being kept informed and up-to-date regarding changes impacting their work.

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Communications – Development and Approval Process

Recommendation: Based on the number and varied topics about the transformation and supporting initiatives, the State should implement a process to review and approve all communications that is efficient and allows timely information sharing and mitigates the potential for information overload for employees involved.

The Communications Plan outlines messages to be delivered throughout the course of the project. Based on the timing and content of the messages, the appropriate team members will need to be involved in the development and review process.

- Define <u>roles and responsibilities</u> regarding communication development, approval, delivery and feedback
- Follow program and State <u>communication guidelines</u> (e.g., branding, templates)

Develop Communications	Coordinate and Conduct Reviews	Submit for Approval	Deliver the Communications
• Leverage content owners to create messaging • Identify appropriate communications vehicles and channels for the target audience and the message	• Identify related content owners and peer reviewers to check for aligning both the content and the scheduling alignment	• Identify the appropriate owner of the message, e.g., is it a Procurement Transformation message or a specific message related to a function area?	• Use standard communications vehicles and channels to deliver • Assist senders in working through the process

Target Audience Feedback Loop

Communications – Tracker

Recommendation: All Procurement Transformation teams should use a single Communications Tracker as the primary mechanism to schedule, track, and de-conflict formal communications in order logically leverage multiple communications channels and yet minimize redundancy and information overload for stakeholders. There should be one Communications Tracker for the program that consolidates all communications planning for individual initiatives and will:

- Outline communication events by audience

- Provide the master list of planned and completed communications for the project

- Include detailed information such as:
  - Audience   – Reviewers/Approver/Sender
  - Key Messages   – Timing

Sample Template*:

ID	Area	Details & Audience					Overview				Roles & Responsibilities			
		Comm Name	Purpose	Key Messages	Audience	Delivery Vehicle	Sched, Delivery Date	Actual Delivery Date	Freq.	Status	Develop	Review	Approve	Deliver
1	Leadership	Status Update	Status	Overall status; key events; accomplish-ments to date; future priorities; issues/risk	DOA, State Agency, and Community College Leadership	Memo	Q1		Quarterly	Not Started	Comms Team		DOA	DOA

The information contained in this sample is illustrative.
Refer to the Communications Plan for each initiative for more detailed information.

Communications – Feedback Mechanisms

Recommendation: The State should view communications as an iterative process which must be continually monitored using various feedback mechanisms to gauge the effectiveness of messages. By using one or more of these mechanisms, feedback allows program leadership and the communications team to ensure the "right" messages are being received by the intended target audiences.

Feedback will be collected through:

- *Email Inbox – A single program mailbox—administered by the Communications Team—where questions and comments can be submitted and answered by the Procurement Transformation team members based on content of feedback*

- *Communicator Feedback - provided through Q&As or both formal and informal responses received from employees. These should be forwarded to the Communications Team in order to update relevant messages/materials*

- *Readiness Assessment – Enables program leadership to understand where target audiences are on the commitment curve and prompts leadership to take actions to mitigate any concerns*

- *FAQs – The use of Frequently Asked Questions will help in understanding key areas of concern as the program is implemented*

Message(s) communicated → Target audiences receive message(s) → Feedback solicited:
- E-mail
- FAQs process
- Communicator Feedback
- Readiness Assessment
→ Knowledge / action gaps assessed → Updated message(s) created →

Communications Vehicles – Website

Recommendation: Continue to use the website created during the Assessment to communicate Fact Sheets, standard program briefings, Frequently Asked Questions (FAQs), and continue to update with links to related information, e.g., Administrative Code, pending legislation.

Prominently display the link to the shared mailbox (Procurement@doa.nc.gov*), throughout the web pages as a feedback mechanism through which stakeholders can send feedback and/or questions.

* As the program scope increases, multiple individuals should have access to this shared mailbox and more defined processes put in place to manage responses. It can also be leveraged to send newsletters/postcards or request input from various stakeholders.

![accenture logo] High performance. Delivered.
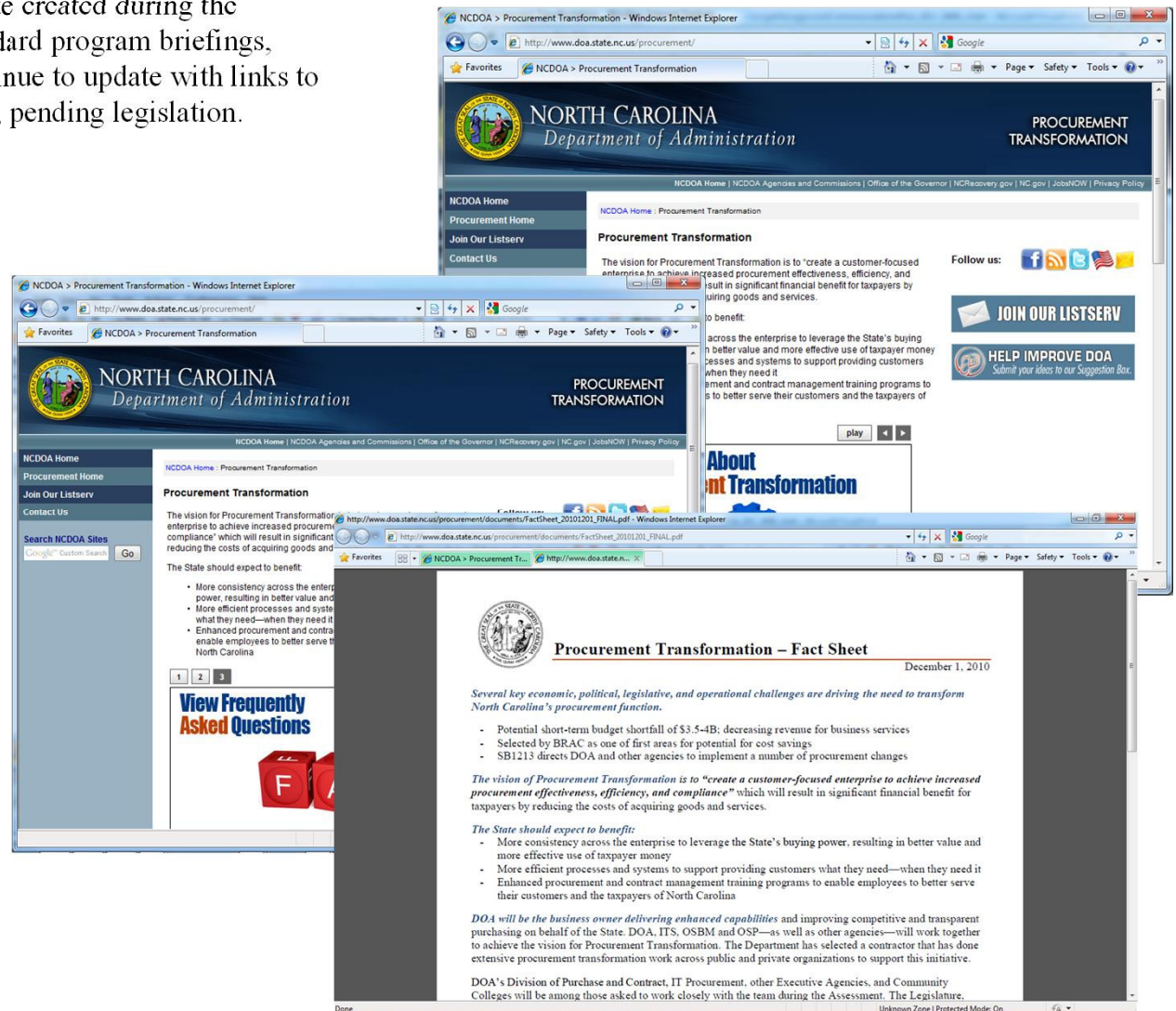
Communications Vehicles – Postcards and Updates

Recommendation: The Procurement Transformation program should create two standard communications vehicles: a Procurement Transformation Postcard and a Procurement Transformation Update. The Postcard will include short notes on current or planned activities and links find more information or get involved. The Update will be used to announce upcoming meetings on various topics, e.g., Sourcing or Technology. These two types of communications can be used to "push" information to targeted stakeholder groups.

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Communications Vehicles – Formal Memos

Recommendation: Use formal memos from leadership to both statewide and procurement function audiences for formal announcements, to establish policy, and periodically provide updates on progress of the transformation and supporting activities.

Memos from the program team may be used to solicit information or participation in a more formal manner.

North Carolina
Department of Administration

Beverly Eaves Perdue, Governor   Moses Carey, Jr., Secretary

December 8, 2010

TO: Agency Secretaries and Community College Presidents

FR: Moses Carey, Jr., Secretary
           Department of Administration

RE: Procurement Transformation

The Department of Administration has launched an initiative to transform the procurement function across Executive Agencies and Community Colleges. Several key economic, legislative, and operational challenges are driving this initiative including the potential short-term annual budget shortfall of $3.5 - $4 billion, the Governor's goal of Setting Government Straight, her Budget Reform and Accountability Commission's direction to look at procurement because of the potential for cost savings and efficiencies, and the directives in Senate Bill 1213 (SB1213) to strengthen procurement oversight and compliance.

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Communications
– Procurement Transformation Branding

Recommendation: All Procurement Transformation communications should use the official templates and color schemes to create a program identity and support consistent communications. Individual initiatives included in the transformation may use unique or existing branding, e.g., eProcurement.

Color Palette						

RGB Codes	221	0	34	238	0	153
	68	51	68	170	34	153
	17	68	51	0	102	119

By using these templates for communications, the program team:

- *Speaks with "one voice" throughout communications*
- *Creates a program identity through a consistent visual presentation of messages*
- *Increases recognition of the Procurement Transformation communications*
- *Reduces time spent formatting—or reformatting— materials*
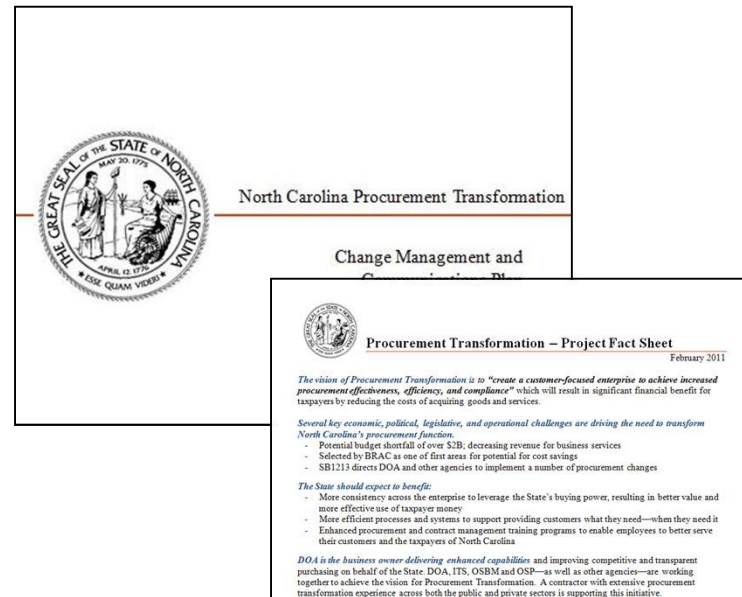
North Carolina Procurement Transformation

Change Management and

Procurement Transformation – Project Fact Sheet
February 2011

- **Executive Summary**
- **Integrated Change Management and Communications Approach**
- **Change Management Strategy and Plan of Activities**
- **Communications Strategy and Plan**
- **Communications Planning Timelines**
  - **Strategy & Governance**
  - **Organization**
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Communications Planning Timelines

To help coordinate and execute the deployment of approved recommendations, this section includes the high level planning timelines for the initiatives and related communications proposed for major activities and milestones.

The "Implementation Plan" outlining the key activities and milestones for each area of Procurement Transformation is included for reference
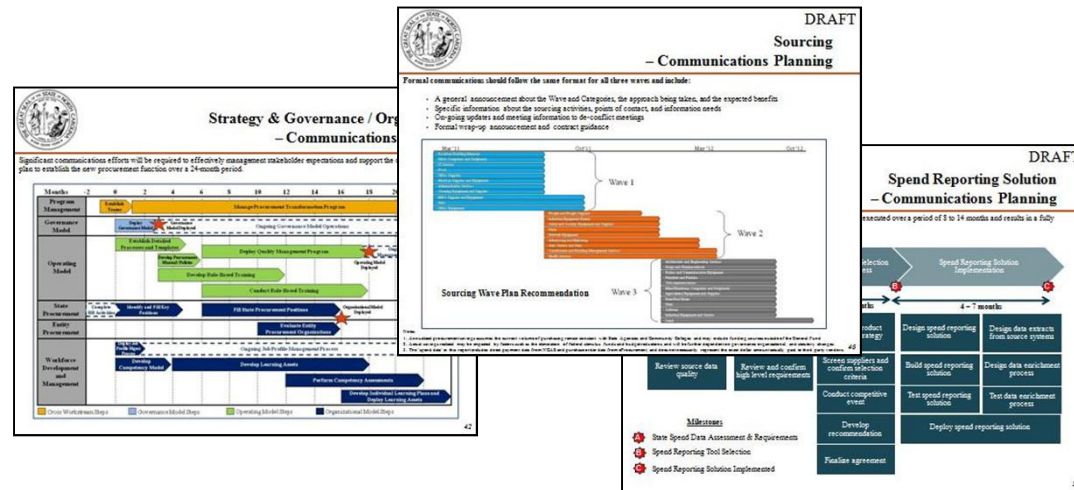
For each area, a one-page slide is provided to summarize the communications planning
- Timing for the Communications
- Message(s)
- Communications Vehicle
- Sender
- Audience

Note: The communications included reflect only high level program communications.

Additional planning will be required during implementation to outline targeted communications necessary for the workstream(s) to execute their responsibilities.

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Strategy & Governance / Organization – Communications Planning

Significant communications efforts will be required to effectively management stakeholder expectations and support the complex implementation plan to establish the new procurement function over a 24-month period.
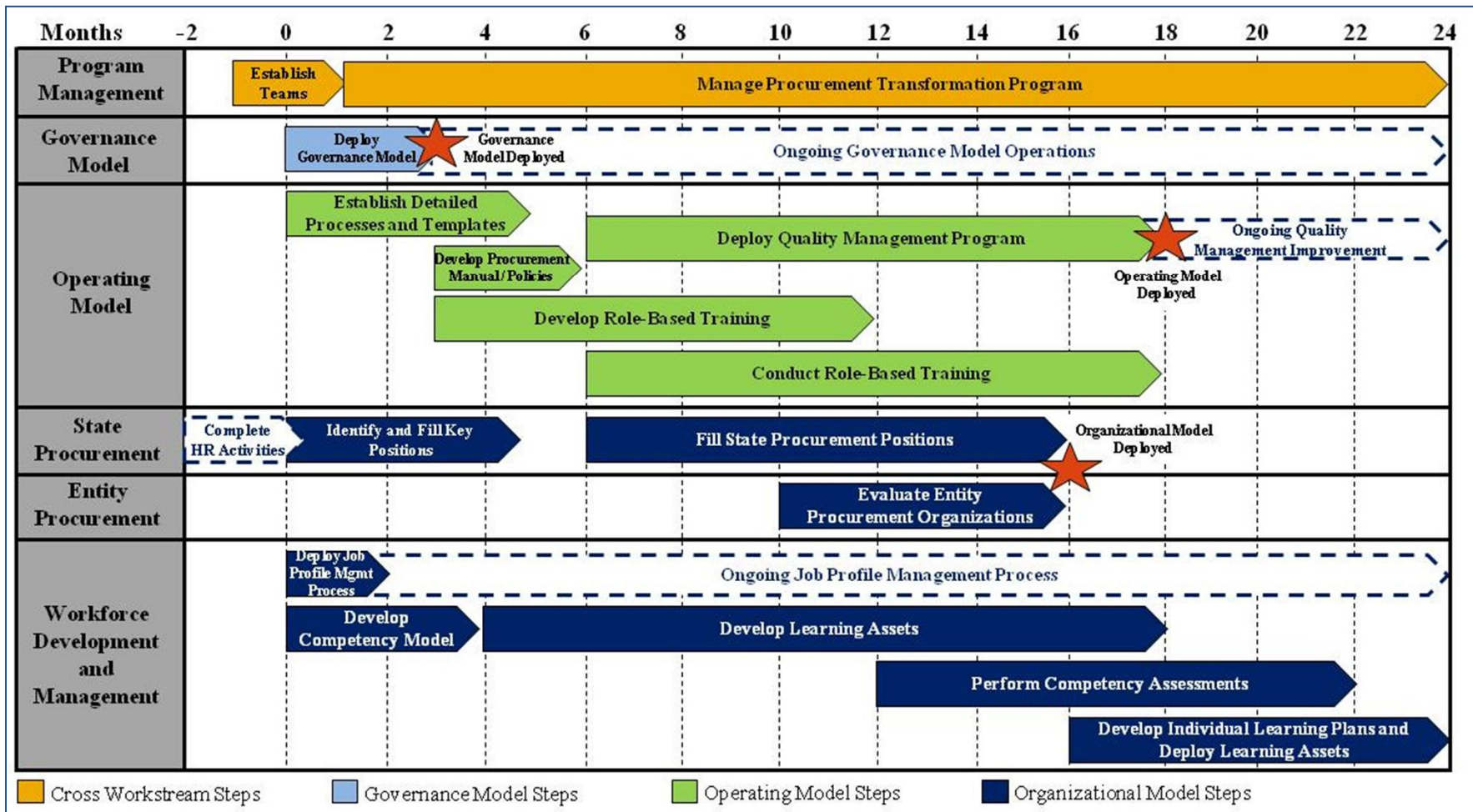
Governance & Operating Model – Communications Planning
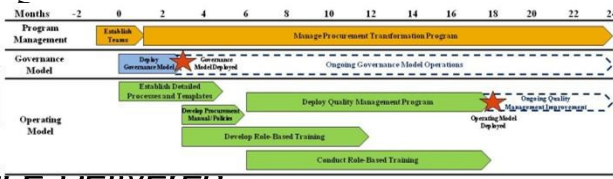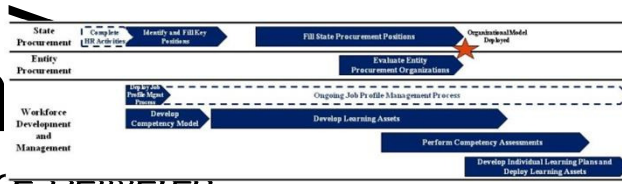
This communications planning should be updated based on decisions and timelines for implementing the governance/operating models.

Timing	Message	Vehicle	Sender	Audience
Decision to implement	Announce the new Governance Model -Describe purpose, authorities, and membership -Focus areas and meeting frequency	Memo Email Website All Hands	Secretary of Administration and State Procurement Officer	All Procurement Employees, Executive Agency Secretaries and Community College Business Officers, Finance and Budget Officers
~45-60 days from decision	Announce roll-out of Balanced Scorecard	Memo Email Website	State Procurement Officer & Procurement Governance Team	All Procurement Employees, Executive Agency Secretaries and Community College Business Officers, Finance and Budget Officers
As Required	Communicate key decisions	Memo Email Website	State Procurement Officer & Procurement Governance Team	All impacted stakeholders
As Required	Implementation of new/updated policies, processes, and/or procedures	Memo Email Website	State Procurement Officer & Procurement Governance Team	All Procurement Employees
Quarterly	Share summary results of performance measures and scorecard	Memo Email Website	State Procurement Officer & Procurement Governance Team	All Procurement Employees, Executive Agency Secretaries and Community College Business Officers, Finance and Budget Officers
As Required	Procurement Results Management Action Plans -Contributing factors and desired outcomes -Action Plan, including expectations and deadline	Memo	State Procurement Officer & Procurement Governance Team	All impacted stakeholders
As Required	Subcommittee formation and progress reports	Memo Email	State Procurement Officer & Procurement Governance Team	All impacted stakeholders; leverage Procurement Postcard for general awareness
Team Formation	Announcement about team formation to develop detailed processes and templates	Email Postcard	State Procurement Officer & Procurement Governance Team	All Procurement Employees, Executive Agency Secretaries and Community College Business Officers, Finance and Budget Officers
Completion of Manual	Announcement of Procurement Manual	Email Postcard	State Procurement Officer & Procurement Governance Team	All Procurement Employees, Executive Agency Secretaries and Community College Business Officers, Finance and Budget Officers
15-30 days prior to training	Kick-off Role-Based Training	Email	State Procurement Officer & Procurement Governance Team	All impacted employees; leverage Procurement Postcard for general awareness

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Organization & Workforce – Communications Planning

This communications planning should be updated based on decisions and timelines for implementing organization-related initiatives.

Timing	Message	Vehicle	Sender	Audience
Decision to reorganize	Communicate new State Procurement organizational structure and transition plan	Memo Press Release	Secretary of Administration and State Procurement Officer	All Procurement Employees, Executive Agency Secretaries and Community College Business Officers, Finance and Budget Officers, and the general public
Upon decisions	Hiring of key individuals for the new State Procurement Office	Memo	Secretary of Administration and State Procurement Officer	All Procurement Employees, Executive Agency Secretaries and Community College Business Officers, Finance and Budget Officers, and the general public
Completion of profiles and career path mapping	Announce new job profiles, career path mapping, and career opportunities	Memo Email Website	Office of State Personnel	All Procurement Employees, Executive Agency Secretaries and Community College Business Officers
Completion of task	Announce the development of a procurement competency model, available learning assets, and schedule for developing and implementing Individual Learning Plans	Memo Email Website	State Procurement Officer and Office of State Personnel	All Procurement Employees; leverage Procurement Postcard for general awareness
~ Month 10	Announce the kick-off of evaluating entity procurement organizations/positions	Memo Email	TBD – Secretary of Administration, State Procurement Officer, and/or Procurement Transformation Program Manager	Executive Agency Secretaries and Community College Business Officers, Agency /Community College Procurement Directors, leverage Procurement Postcard for general awareness
Completion of reorganized entities	Announce full deployment of the statewide procurement reorganization and operating model deployment	Memo Email Website Press Release	Secretary of Administration and State Procurement Officer	All Procurement Employees, Executive Agency Secretaries and Community College Business Officers, Finance and Budget Officers, and the general public

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Sourcing – Communications Planning

Formal communications should follow the same format for all three waves and include:

- A general announcement about the Wave and Categories, the approach being taken, and the expected benefits
- Specific information about the sourcing activities, points of contact, and information needs
- On-going updates and meeting information to de-conflict meetings
- Formal wrap-up announcement and contract guidance

Sourcing Wave Plan Recommendation
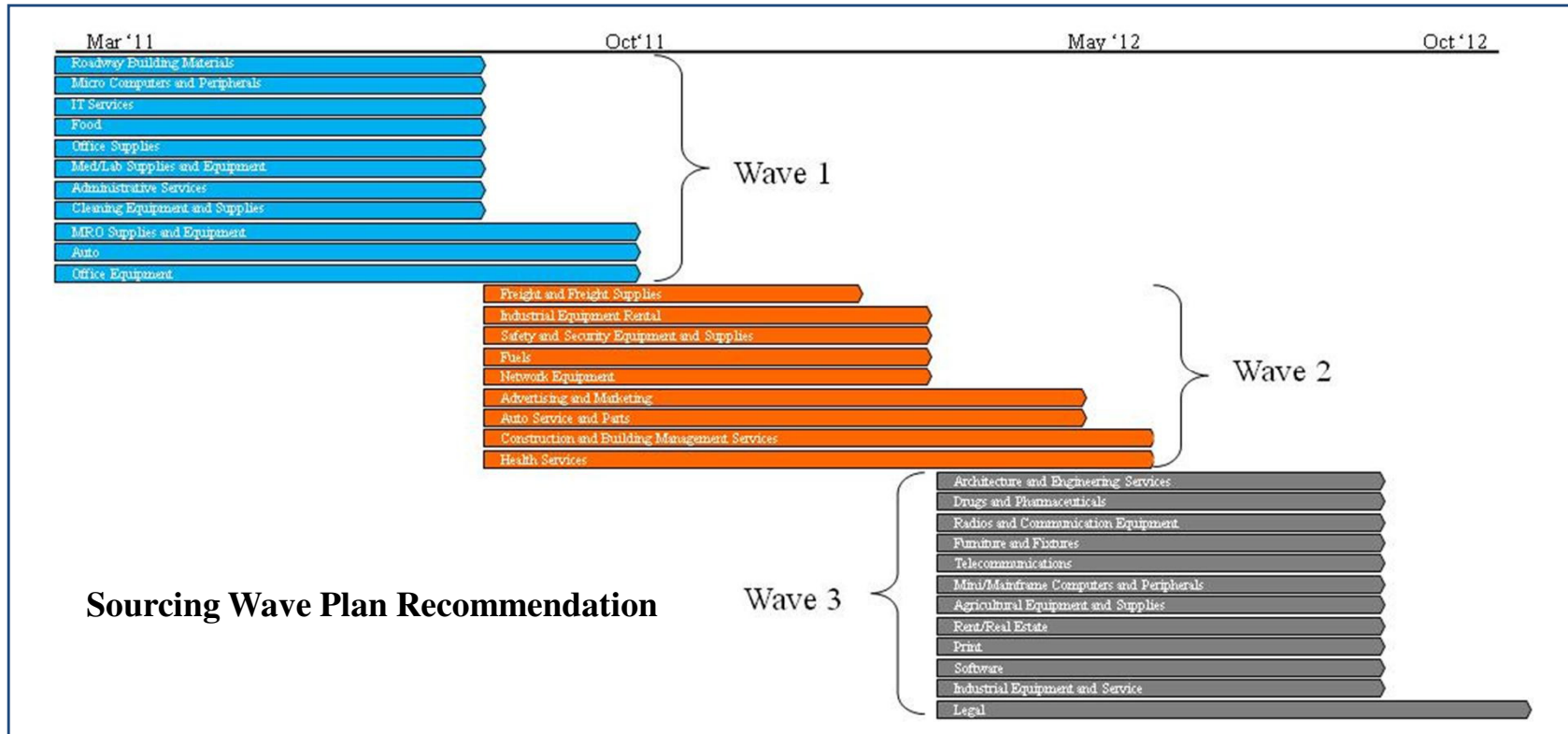
Notes:
1. Annualized procurement savings assumes the current volume of purchasing remain constant with State Agencies and Community Colleges and may include funding sources outside of the General Fund
2. Actual savings realized may be impacted by factors such as the elimination of federal stimulus funds and budget reductions, and will be further dependent on governance, organizational, and statutory changes.
3. The 'spend data' in this report includes direct payment data from NCAS and purchase order data from eProcurement, and does not necessarily represent the exact dollar amount actually paid to third party vendors.

Sourcing – Communications Planning
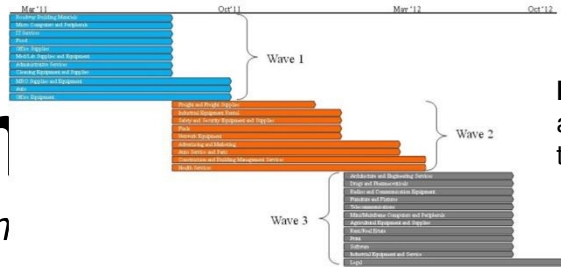
Note: This set of communications activities should be repeated as necessary to support additional sourcing waves.

This high-level communications planning should be updated based on decisions and timelines for the sourcing wave plan implementation.

Timing	Message	Vehicle	Sender	Audience
2 weeks prior to Kick-Off of Sourcing	Announcement of Sourcing Wave* -Objective and Expected Outcomes -Categories /areas included in the effort -Who's involved -Timeline -Background on Wave Planning -Contact	Email Website Press Release	State Procurement Officer	All Procurement Employees, Executive Agency Secretaries and Community College Business Officers, Finance and Budget Officers, and general public
Week 1	Announce Kick-Off Session and Action Plan -Names associated with categories -Outline activities and information needs	Email	State Procurement Officer	Named Procurement Employees participating as members of the Sourcing Teams; Cc: Procurement Directors/Business Officers
Week 2	Announcement for Vendors/Suppliers for Impacted Categories -Objective and Expected Outcomes -Timeline	IPS Email	n/a	Vendors/Suppliers
Monthly	Meetings and Priorities Announcement	Meetings and Priorities Snapshot (Email)	Procurement@doa.nc.gov	Named Procurement Employees participating as members of the Sourcing Teams; Cc: Procurement Directors/Business Officers
Monthly	Update on Progress, Achievements	Procurement Postcard (Email)	Procurement@doa.nc.gov	All Procurement Employees, Executive Agency Secretaries and Community College Business Officers, Finance and Budget Officers
Ongoing	Category Team Updates	Email	Category Lead	Named Procurement Employees participating as members of the Sourcing Teams
Conclusion of Sourcing for Category	Wave/Category Wrap-Up -Summary of Achievements for the Wave -Savings -New Contract Summary	Email Website Press Release	Secretary of Administration and State Procurement Director	Procurement Employees, Executive Agency Secretaries and Community College Business Officers, Finance and Budget Officers, and general public
	Formal guidance on new contract(s) and how to purchase using them	Formal Memo	State Procurement Director	All Procurement Employees, Executive Agency Secretaries and Community College Business Officers, Finance and Budget Officers

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Ariba Upgrade
– Communications Planning

The Ariba upgrade for eProcurement must be implemented in March 2012.

3/19/2012

Plan & Design	Build	Test & Train	Deploy
A	**B**	**C**	**D**

Plan & Design
- **Review Current Functionality**
  - **Analysis of 8.2.1 Enhancements**
  - **Standardize workflow**
- **Confirm Requirements**
- **Define DOT Interface Approach**
- **Deliver Functional Design**
- **Identify Hardware Requirements & Begin Procurement**
- **Install & configure base 9r1 Buyer application**

Build
- **Establish migration path**
- **Validate API configuration**
- **Develop interface**
- **Correct and migrate base code line**
- **Re-implement approved enhancements and configuration**
- **Implement new features & functionality**

Test & Train
- **3 System Test Passes (Base functionality, enhancements, integration, batch, scripting)**
- **User Acceptance Testing**
- **Performance Testing**
- **Develop & Deliver Targeted Stakeholder Training Materials**

Deploy
- **Implementation Readiness**
- **Final Cutover**
- **Agency Readiness Communications**
- **Round the Clock Implementation Schedule**

Milestones

A	Design Complete	**C**	Testing Complete and Training Conducted
B	Development Complete	**D**	Upgraded System Implemented

Ariba Upgrade – Communications Planning

This high-level communications planning should be updated based on decisions and timelines for the specific initiative.

Timing	Message	Vehicle	Sender	Audience
30 days after the start of the upgrade	Announcement of project to upgrade eProcurement -Key points of design -Next steps -Expected Deployment date	Email	State Procurement Officer and/or Procurement Transformation Program Manager; eProcurement Team	All impacted stakeholders; leverage Procurement Postcard for general awareness
30-45 days after the start of the upgrade	Solicit feedback on improvements to streamline workflows	Email	eProcurement Team	All impacted stakeholders; leverage Procurement Postcard for general awareness
90 days prior to deployment	Announce the Data Preservation Plan and provide guidance to organizations regarding closing out purchase orders in preparation for cutover to the upgraded system	Email	eProcurement Team	All impacted stakeholders; leverage Procurement Postcard for general awareness
30-60 days prior to deployment	Announce Build Stage completion and solicit volunteers for User Acceptance Testing	Email	State Procurement Officer and/or Procurement Transformation Program Manager; eProcurement Team	All impacted stakeholders; leverage Procurement Postcard for general awareness
30 days prior to deployment	Announce training opportunities and outreach activities to users	Email Website	State Procurement Officer and/or Procurement Transformation Program Manager; eProcurement Team	All impacted stakeholders; leverage Procurement Postcard for general awareness
March 2012	Announce deployment of eProcurement upgrade	Memo Email Website	State Procurement Officer and/or Procurement Transformation Program Manager; eProcurement Team	All impacted stakeholders; leverage Procurement Postcard for general awareness

Spend Reporting Solution – Communications Planning

The recommended implementation plan has four major steps which can be executed over a period of 8 to 14 months and results in a fully implemented spend reporting solution.

Analyze Spend Data Sources & Quality	Assess Data Enrichment and Spend Reporting Requirements	Conduct Selection Process	Spend Reporting Solution Implementation	
3 – 4 weeks	**2 – 4 weeks**	**3 – 5 months**	**4 – 7 months**	
Select data sources	Determine need for source data enrichment	Develop product selection strategy	Design spend reporting solution	Design data extracts from source systems
Review source data quality	Review and confirm high level requirements	Screen suppliers and confirm selection criteria	Build spend reporting solution	Design data enrichment process
		Conduct competitive event	Test spend reporting solution	Test data enrichment process
		Develop recommendation	Deploy spend reporting solution	
		Finalize agreement		

Milestones

A State Spend Data Assessment & Requirements

B Spend Reporting Tool Selection
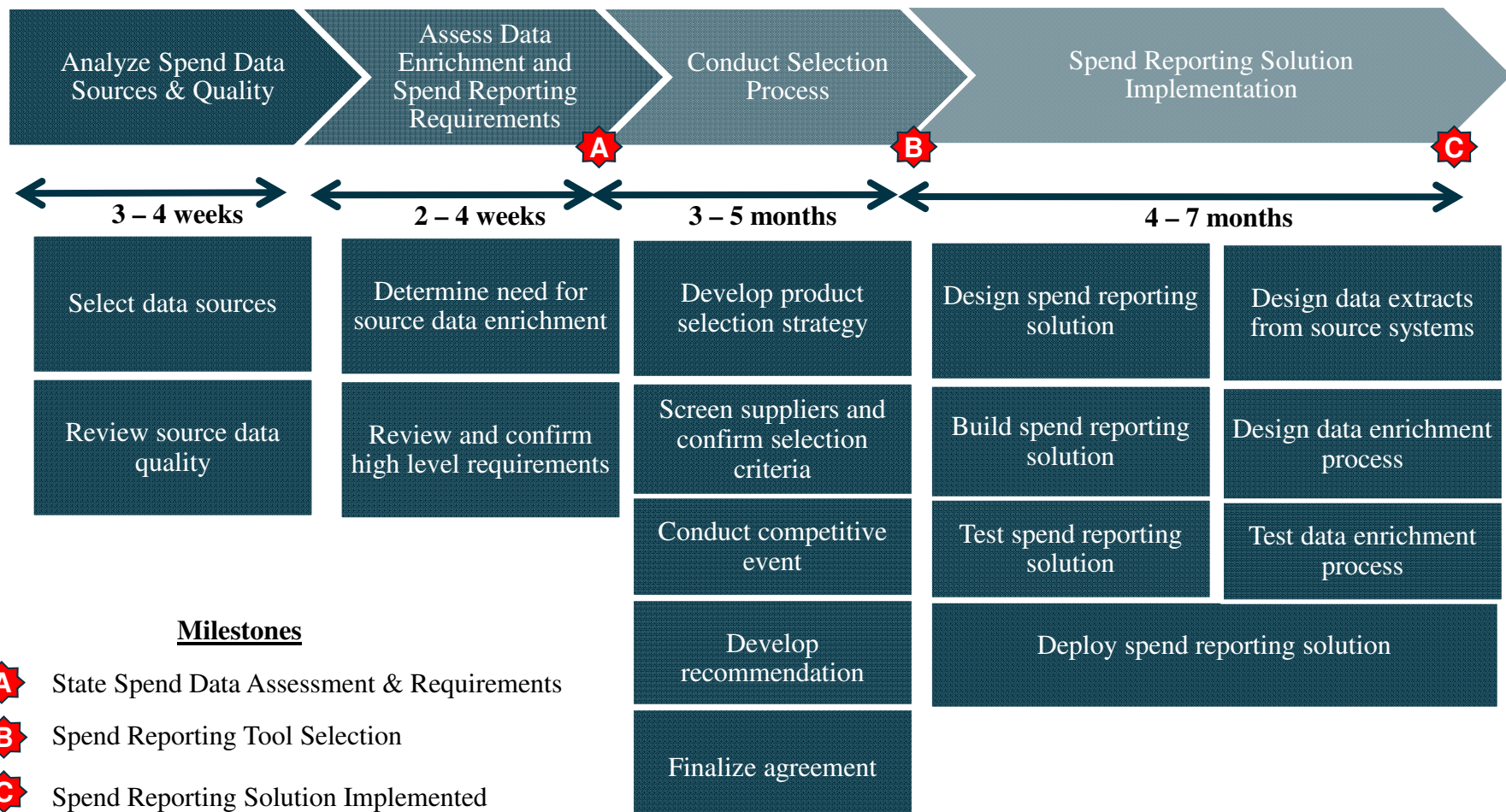
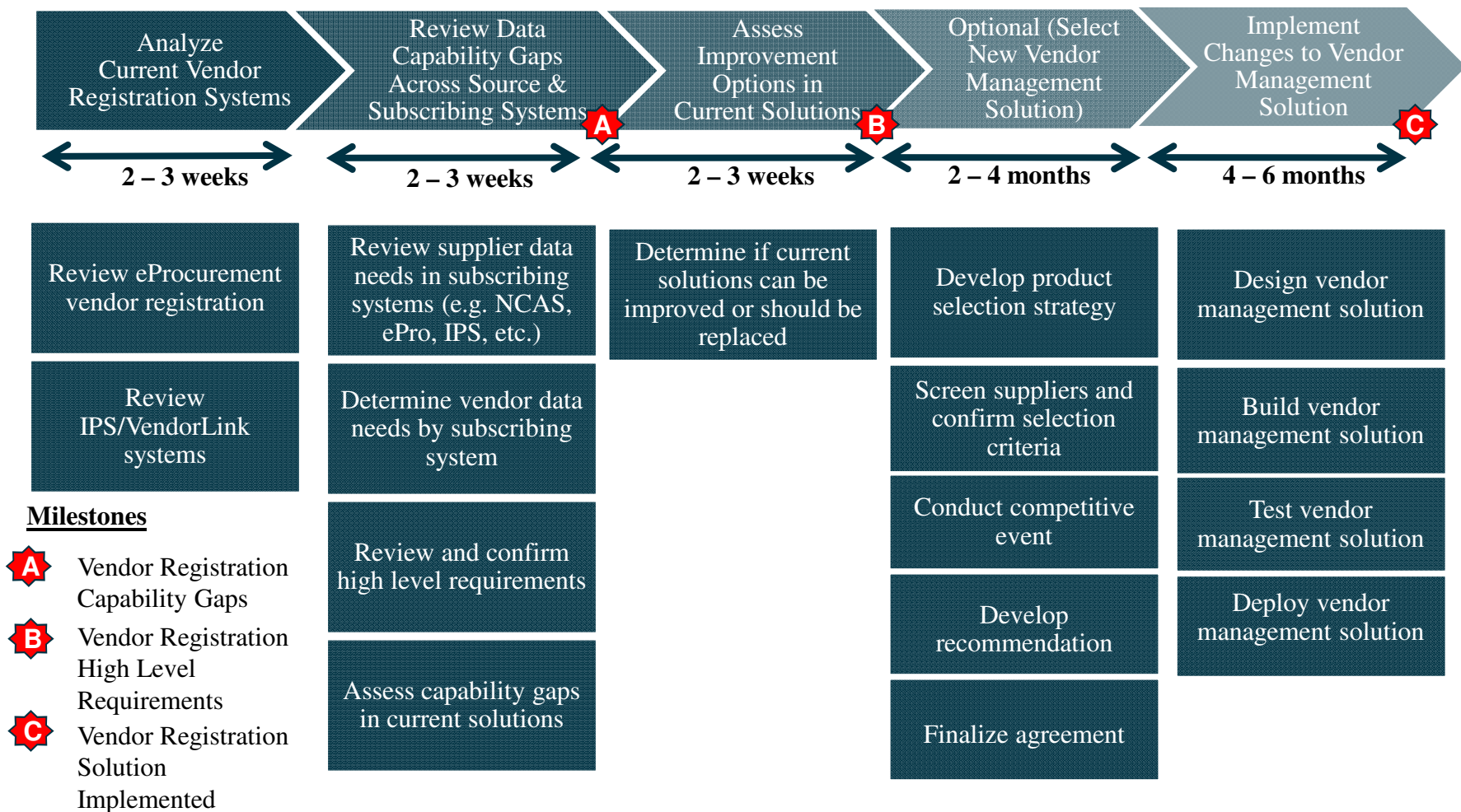C Spend Reporting Solution Implemented

Spend Reporting Solution – Communications Planning

This high-level communications planning should be updated based on decisions and timelines for the specific initiative.

Timing	Message	Vehicle	Sender	Audience
Upon decision	Announcement of decision to select and implement a Spend Reporting Solution and to gather requirements	Email	State Procurement Officer and Procurement Governance Team	All impacted stakeholders; leverage Procurement Postcard for general awareness
~5-8 weeks after decision	Release RFI / RFP	Formal Solicitation	IT Procurement	Vendors
Upon completion of bid/award process	Announce selection of Spend Reporting Solution	Memo Email Website	IT Procurement; State Procurement Officer and Procurement Governance Team	Vendors and all impacted stakeholders; leverage Procurement Postcard for general awareness
Design completion	Announce Design Stage Completion -Key points of design -Next steps -Expected Deployment date	Email	State Procurement Officer and/or Procurement Transformation Program Manager	All impacted stakeholders; leverage Procurement Postcard for general awareness
Build completion/ pre-UAT	Announce Build Stage completion and solicit volunteers for User Acceptance Testing	Email	State Procurement Officer and/or Procurement Transformation Program Manager	All impacted stakeholders; leverage Procurement Postcard for general awareness
Prior to solution deployment	Announce Deployment of Spend Reporting Solution	Memo	State Procurement Officer & Procurement Governance Team	All impacted stakeholders; leverage Procurement Postcard for general awareness

Vendor Registration – Communications Planning

The recommended implementation plan has four key phases and one optional phase, which can be executed over a period of 7 to 12 months to implement a single vendor registration solution.

Analyze Current Vendor Registration Systems	Review Data Capability Gaps Across Source & Subscribing Systems	Assess Improvement Options in Current Solutions	Optional (Select New Vendor Management Solution)	Implement Changes to Vendor Management Solution
2 – 3 weeks	**2 – 3 weeks**	**2 – 3 weeks**	**2 – 4 months**	**4 – 6 months**
Review eProcurement vendor registration	Review supplier data needs in subscribing systems (e.g. NCAS, ePro, IPS, etc.)	Determine if current solutions can be improved or should be replaced	Develop product selection strategy	Design vendor management solution
Review IPS/VendorLink systems	Determine vendor data needs by subscribing system		Screen suppliers and confirm selection criteria	Build vendor management solution
	Review and confirm high level requirements		Conduct competitive event	Test vendor management solution
	Assess capability gaps in current solutions		Develop recommendation	Deploy vendor management solution
			Finalize agreement	

Milestones

A Vendor Registration Capability Gaps

B Vendor Registration High Level Requirements

C Vendor Registration Solution Implemented

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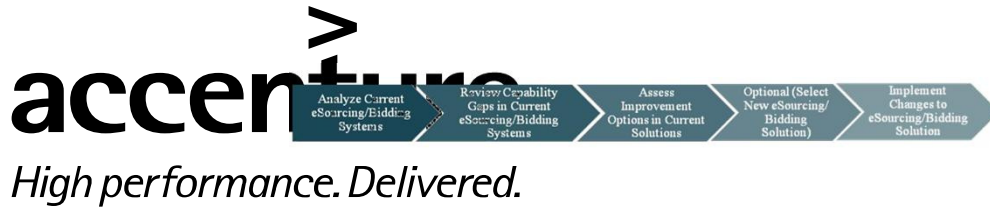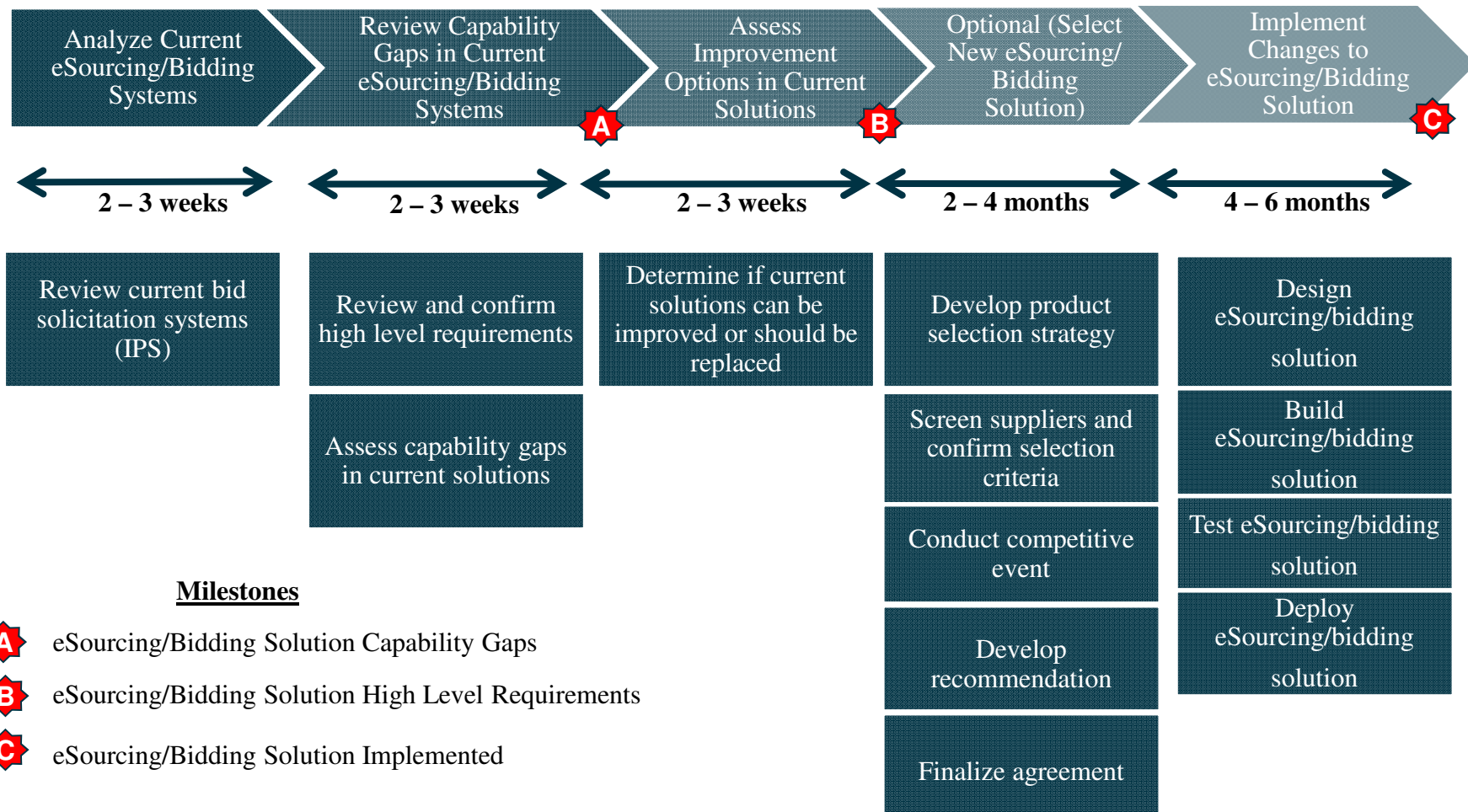# Vendor Registration – Communications Planning

This high-level communications planning should be updated based on decisions and timelines for the specific initiative.

Timing	Message	Vehicle	Sender	Audience
Upon decision	Announcement of decision to select a new or upgrade existing Vendor Registration solution and to gather requirements	Email	State Procurement Officer and Procurement Governance Team	All impacted stakeholders including vendors; leverage Procurement Postcard for general awareness
~5-8 weeks after decision	Release RFI / RFP (if required)	Formal Solicitation	IT Procurement	Vendors
Upon completion of bid/award process	Announce tool selection or decision to upgrade Vendor Registration solution	Memo Email Website	IT Procurement; State Procurement Officer and Procurement Governance Team	Vendors and all impacted stakeholders; leverage Procurement Postcard for general awareness
Design completion	Announce Design Stage Completion -Key points of design -Next steps -Expected Deployment date	Email	State Procurement Officer and/or Procurement Transformation Program Manager	All impacted stakeholders; leverage Procurement Postcard for general awareness
Build completion/ pre-UAT	Announce Build Stage completion and solicit volunteers for User Acceptance Testing	Email	State Procurement Officer and/or Procurement Transformation Program Manager	All impacted stakeholders; leverage Procurement Postcard for general awareness
Prior to solution deployment	Announce Deployment of Vendor Registration solution	Memo Press Release	State Procurement Officer & Procurement Governance Team	All impacted stakeholders; leverage Procurement Postcard for general awareness

eSourcing/Bidding Solution – Communications Planning

The recommended implementation plan has four key phases and one optional phase, which can be executed over a period of 7 to 12 months to implement eSourcing/Bidding solutions with advanced bid submission capabilities.

Analyze Current eSourcing/Bidding Systems	Review Capability Gaps in Current eSourcing/Bidding Systems	Assess Improvement Options in Current Solutions	Optional (Select New eSourcing/ Bidding Solution)	Implement Changes to eSourcing/Bidding Solution
2 – 3 weeks	2 – 3 weeks	2 – 3 weeks	2 – 4 months	4 – 6 months
Review current bid solicitation systems (IPS)	Review and confirm high level requirements	Determine if current solutions can be improved or should be replaced	Develop product selection strategy	Design eSourcing/bidding solution
	Assess capability gaps in current solutions		Screen suppliers and confirm selection criteria	Build eSourcing/bidding solution
			Conduct competitive event	Test eSourcing/bidding solution
			Develop recommendation	Deploy eSourcing/bidding solution
			Finalize agreement	

Milestones **A** – eSourcing/Bidding Solution Capability Gaps

Milestones

A eSourcing/Bidding Solution Capability Gaps

B eSourcing/Bidding Solution High Level Requirements

C eSourcing/Bidding Solution Implemented

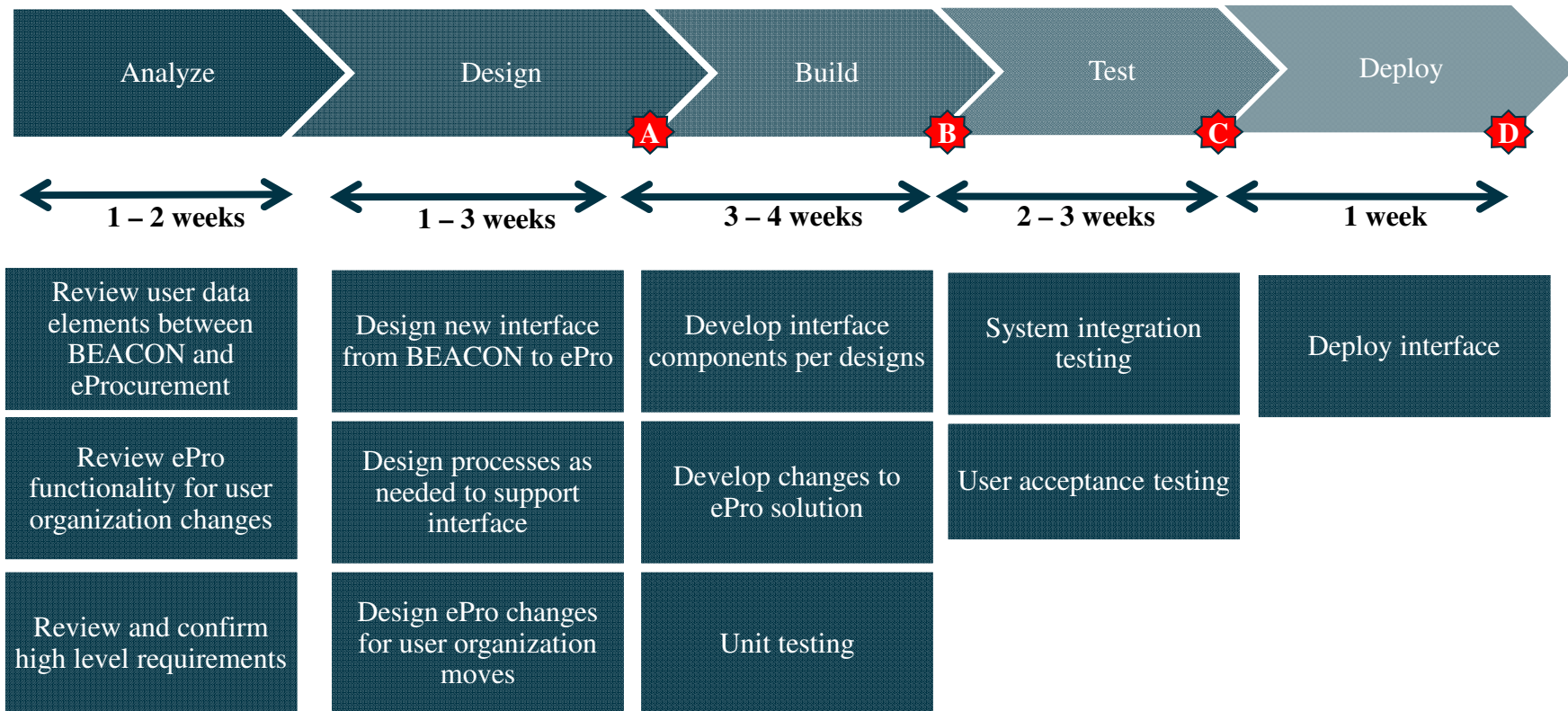# eSourcing/Bidding Solution – Communications Planning

This high-level communications planning should be updated based on decisions and timelines for the specific initiative.

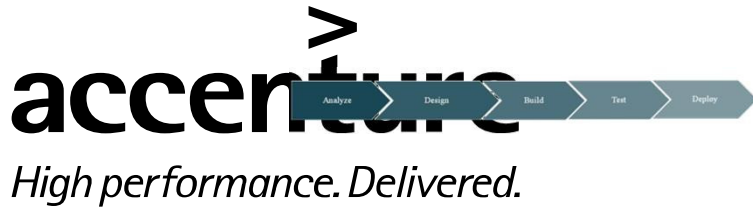| Timing	Message	Vehicle	Sender	Audience
Upon decision	Announcement of decision to select a new or upgrade existing eSourcing/Bidding solution and to gather requirements	Email	State Procurement Officer and Procurement Governance Team	All impacted stakeholders; leverage Procurement Postcard for general awareness
~5-8 weeks after decision	Release RFI / RFP (if required)	Formal Solicitation	IT Procurement	Vendors
Upon completion of bid/award process	Announce tool selection or decision to upgrade eSourcing /Bidding solution	Memo Email Website	IT Procurement; State Procurement Officer and Procurement Governance Team	Vendors and all impacted stakeholders; leverage Procurement Postcard for general awareness
Design completion	Announce Design Stage Completion -Key points of design -Next steps -Expected Deployment date	Email	State Procurement Officer and/or Procurement Transformation Program Manager	All impacted stakeholders; leverage Procurement Postcard for general awareness
Build completion/ pre-UAT	Announce Build Stage completion and solicit volunteers for User Acceptance Testing	Email	State Procurement Officer and/or Procurement Transformation Program Manager	All impacted stakeholders; leverage Procurement Postcard for general awareness
Prior to solution deployment	Announce Deployment of eSourcing/Bidding solution	Memo Press Release	State Procurement Officer & Procurement Governance Team	All impacted stakeholders; leverage Procurement Postcard for general awareness

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User Data Interface & Authentication – Communications Planning

The recommended implementation plan is a standard enhancement effort with five key phases that can be completed in 2 to 3 months.

Analyze	Design	Build	Test	Deploy
1 – 2 weeks	1 – 3 weeks	3 – 4 weeks	2 – 3 weeks	1 week

A **B** **C** **D**

Analyze	Design	Build	Test	Deploy
Review user data elements between BEACON and eProcurement	Design new interface from BEACON to ePro	Develop interface components per designs	System integration testing	Deploy interface
Review ePro functionality for user organization changes	Design processes as needed to support interface	Develop changes to ePro solution	User acceptance testing	
Review and confirm high level requirements	Design ePro changes for user organization moves	Unit testing		

Milestones

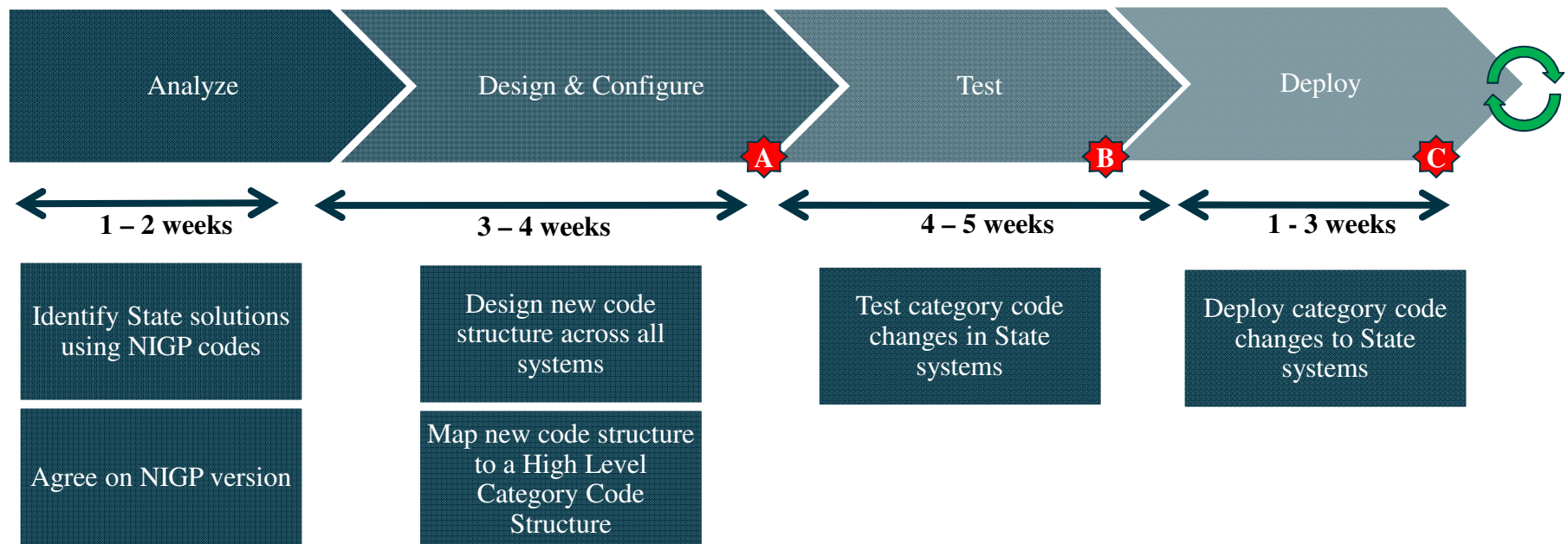|			
A	User Data Interface Design Sign-off	**C**	User Data Interface UAT Sign-off
B	User Data Interface Build Sign-off	**D**	User Data Interface Design Implemented

User Data Interface & Authentication – Communications Planning

This high-level communications planning should be updated based on decisions and timelines for the specific initiative.

Timing	Message	Vehicle	Sender	Audience
Upon decision	Announcement of project to enhance eProcurement user data interface and authentication using BEACON data -Key points of design -Next steps -Expected Deployment date	Email	State Procurement Officer and/or Procurement Transformation Program Manager	All impacted stakeholders; leverage Procurement Postcard for general awareness
Build completion/ pre-UAT	Announce Build Stage completion and solicit volunteers for User Acceptance Testing	Email	State Procurement Officer and/or Procurement Transformation Program Manager	All impacted stakeholders; leverage Procurement Postcard for general awareness
Prior to solution deployment	Announce Deployment of new user data interface and authentication enhancement	Memo	State Procurement Officer and/or Procurement Transformation Program Manager	All impacted stakeholders; leverage Procurement Postcard for general awareness

Category Structure Update – Communications Planning

The recommended implementation plan includes 4 key phases and can be completed in 3 to 4 months to synchronize the code structure between NCAS and eProcurement. Synchronization with additional source systems may extend the duration or be accomplished in follow a project.

Analyze	Design & Configure	Test	Deploy
1 – 2 weeks	3 – 4 weeks	4 – 5 weeks	1 - 3 weeks
Identify State solutions using NIGP codes	Design new code structure across all systems	Test category code changes in State systems	Deploy category code changes to State systems
Agree on NIGP version	Map new code structure to a High Level Category Code Structure		

A — Category Code Structure Design Sign-off (between Design & Configure and Test)
B — Category Code Structure Test Sign-off (between Test and Deploy)
C — Category Code Structure Implementation (end of Deploy)

Milestones

A Category Code Structure Design Sign-off

B Category Code Structure Test Sign-off

C Category Code Structure Implementation

The category structure should periodically be revisited and updated as necessary.
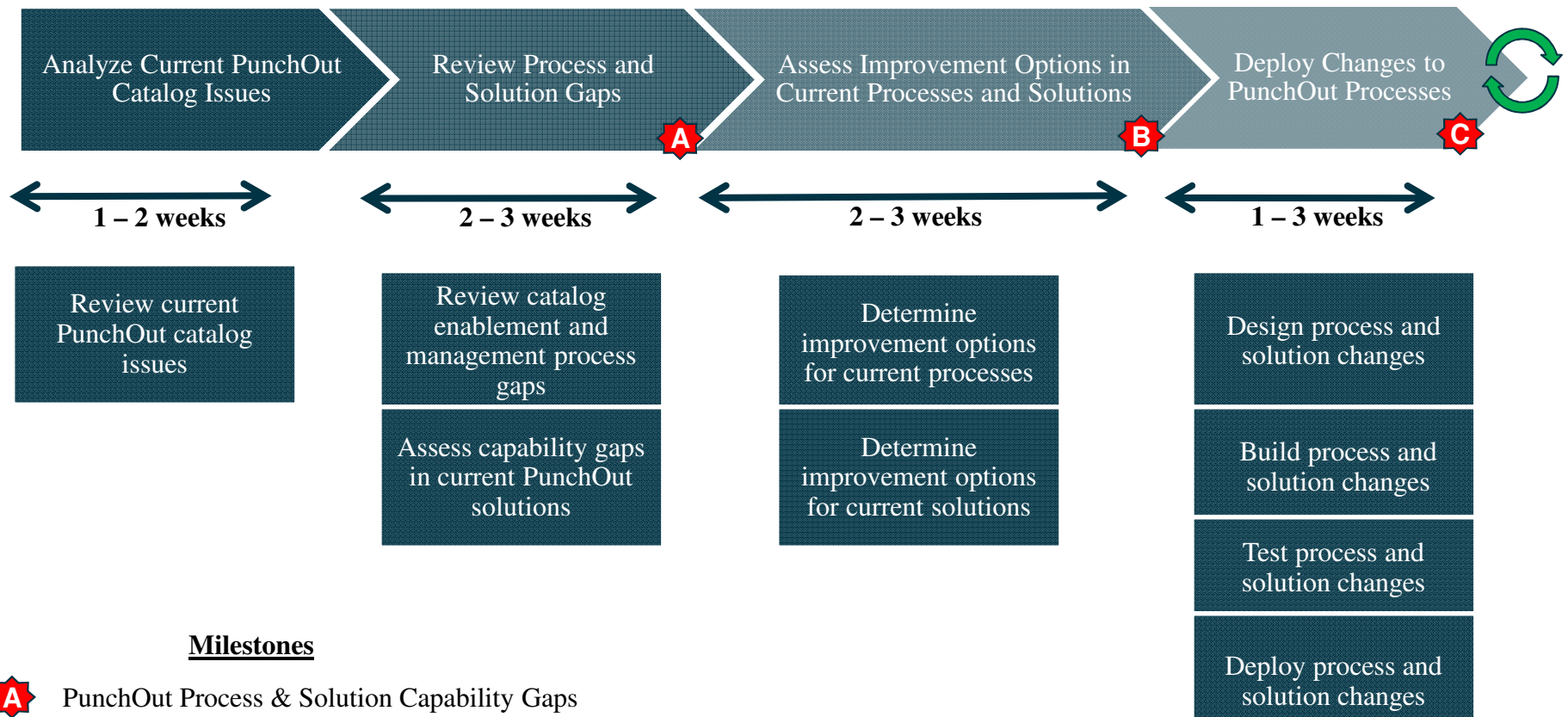
Category Structure Update – Communications Planning

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| Analyze | Design & Configure | Test | Deploy |

This high-level communications planning should be updated based on decisions and timelines for the specific initiative.

Timing	Message	Vehicle	Sender	Audience
Upon decision	Announcement of project to update Category Structure using agreed to NIGP codes -Key points of design -Next steps -Expected Deployment date	Email	State Procurement Officer and/or Procurement Transformation Program Manager	All impacted stakeholders; leverage Procurement Postcard for general awareness
Build completion/ pre-UAT	Announce Build Stage completion and solicit volunteers for User Acceptance Testing	Email	State Procurement Officer and/or Procurement Transformation Program Manager	All impacted stakeholders; leverage Procurement Postcard for general awareness
Prior to solution deployment	Announce Deployment of update to the Category Structure	Memo	State Procurement Officer and/or Procurement Transformation Program Manager	All impacted stakeholders; leverage Procurement Postcard for general awareness

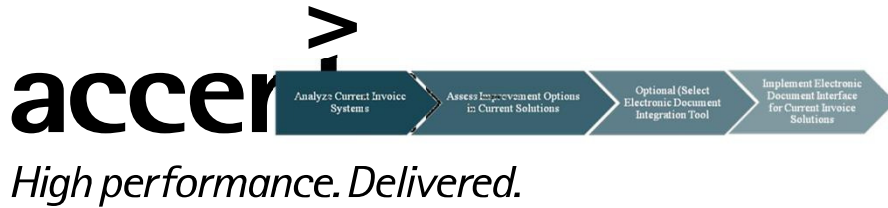# PunchOut Catalog Management – Communications Planning

The implementation plan includes 4 key phases and can be completed in 2 to 3 months to design and implement an improved PunchOut catalog management process improving price audits.

Analyze Current PunchOut Catalog Issues	Review Process and Solution Gaps	Assess Improvement Options in Current Processes and Solutions	Deploy Changes to PunchOut Processes
1 – 2 weeks	**2 – 3 weeks**	**2 – 3 weeks**	**1 – 3 weeks**

(A) between Review Process and Assess Improvement
(B) between Assess Improvement and Deploy Changes
(C) at end of Deploy Changes

Review current PunchOut catalog issues	Review catalog enablement and management process gaps	Determine improvement options for current processes	Design process and solution changes
	Assess capability gaps in current PunchOut solutions	Determine improvement options for current solutions	Build process and solution changes
			Test process and solution changes
			Deploy process and solution changes

Milestones

A PunchOut Process & Solution Capability Gaps

B PunchOut High Level Requirements

C New PunchOut Processes and Solutions Implemented

The PunchOut management process will be used for future catalog deployments.
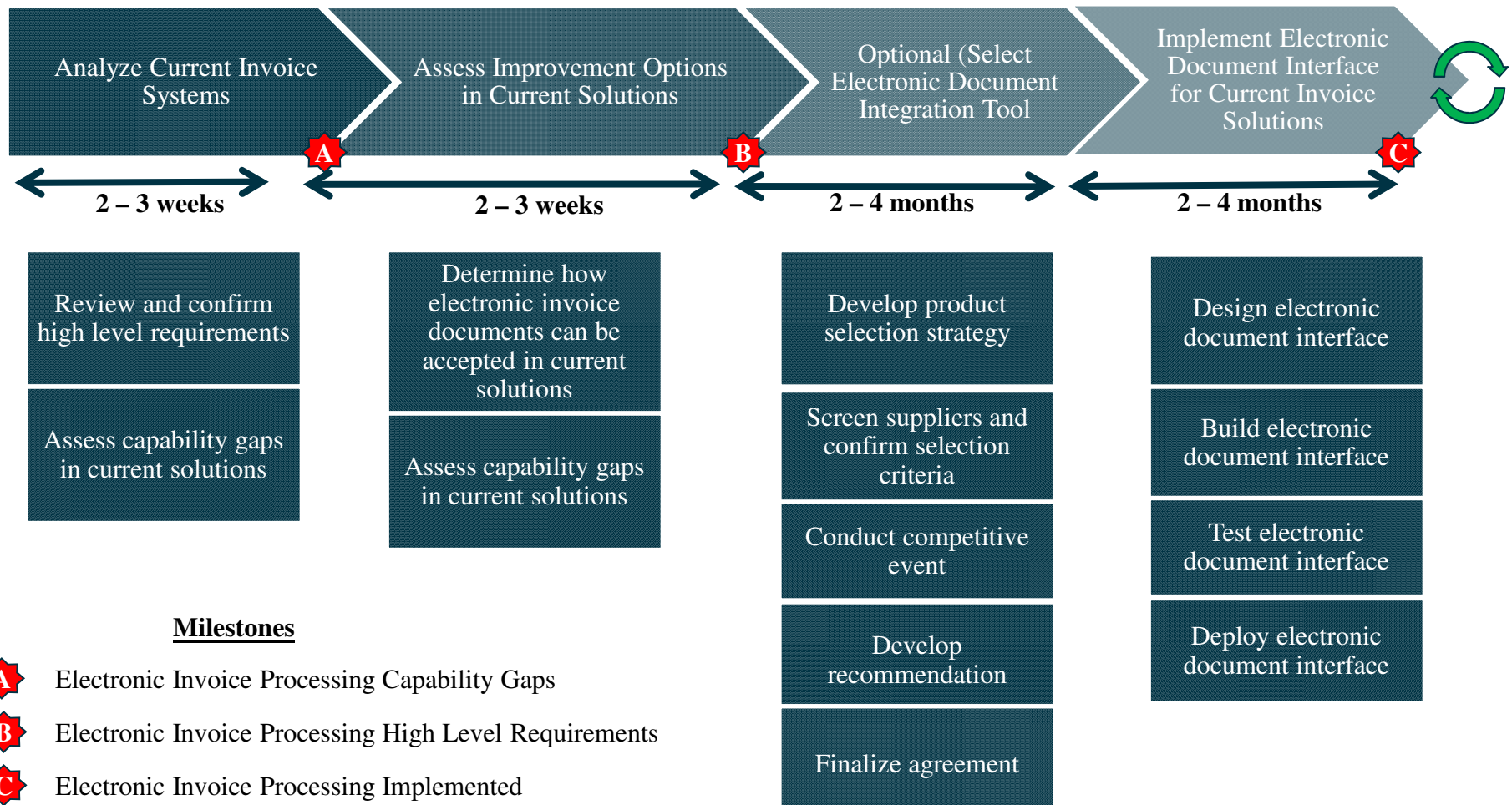
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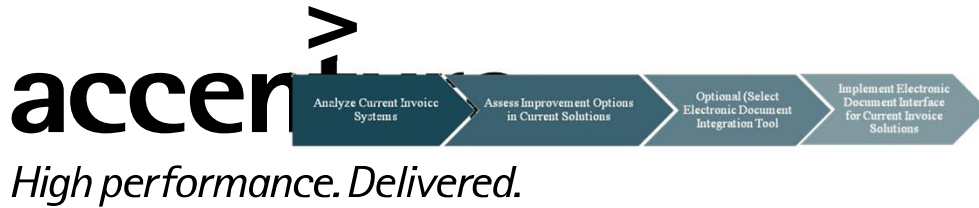# PunchOut Catalog Management – Communications Planning

This high-level communications planning should be updated based on decisions and timelines for the specific initiative.

Timing	Message	Vehicle	Sender	Audience
Upon decision	Announcement of project to review current Punchout catalog issues -Key areas for review -Next steps -Expected roll-out of improved management process	Email	State Procurement Officer and/or Procurement Transformation Program Manager	P&C and IT Procurement; leverage Procurement Postcard for general awareness
Build completion/ pre-UAT	Announce Build Stage completion and solicit volunteers for User Acceptance Testing	Email	State Procurement Officer and/or Procurement Transformation Program Manager	P&C and IT Procurement; leverage Procurement Postcard for general awareness
Prior to solution deployment	Announce Deployment of catalog management process and solution changes	Email	State Procurement Officer and/or Procurement Transformation Program Manager	All catalog users; leverage Procurement Postcard for general awareness

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Electronic Invoice Processing – Communications Planning

There are three key phases and one optional phase, which can be executed over a period of 6 to 10 months to implement electronic invoice processing with State NCAS based Agencies.

Analyze Current Invoice Systems	Assess Improvement Options in Current Solutions	Optional (Select Electronic Document Integration Tool)	Implement Electronic Document Interface for Current Invoice Solutions
A	**B**		**C**
2 – 3 weeks	2 – 3 weeks	2 – 4 months	2 – 4 months

Review and confirm high level requirements	Determine how electronic invoice documents can be accepted in current solutions	Develop product selection strategy	Design electronic document interface
Assess capability gaps in current solutions	Assess capability gaps in current solutions	Screen suppliers and confirm selection criteria	Build electronic document interface
		Conduct competitive event	Test electronic document interface
		Develop recommendation	Deploy electronic document interface
		Finalize agreement	

Milestones

A Electronic Invoice Processing Capability Gaps

B Electronic Invoice Processing High Level Requirements

C Electronic Invoice Processing Implemented

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Electronic Invoice Processing – Communications Planning

This high-level communications planning should be updated based on decisions and timelines for the specific initiative.

Timing	Message	Vehicle	Sender	Audience
Upon decision	Announcement of decision to select a new or upgrade existing Electronic Invoice Processing solution and to gather requirements	Email	State Procurement Officer and Procurement Governance Team	All impacted stakeholders; leverage Procurement Postcard for general awareness
~2-3 months after decision	Release RFI / RFP (if required)	Formal Solicitation	IT Procurement	Vendors
Upon completion of bid/award process	Announce tool selection or decision to upgrade Electronic Invoice Processing solution	Memo Email Website	IT Procurement; State Procurement Officer and Procurement Governance Team	Vendors and all impacted stakeholders; leverage Procurement Postcard for general awareness
Design completion	Announce Design Stage Completion -Key points of design -Next steps -Expected Deployment date	Email	State Procurement Officer and/or Procurement Transformation Program Manager	All impacted stakeholders; leverage Procurement Postcard for general awareness
Build completion/ pre-UAT	Announce Build Stage completion and solicit volunteers for User Acceptance Testing	Email	State Procurement Officer and/or Procurement Transformation Program Manager	All impacted stakeholders; leverage Procurement Postcard for general awareness
Prior to solution deployment	Announce Deployment of Electronic Invoice Processing solution	Memo	State Procurement Officer & Procurement Governance Team	All impacted stakeholders; leverage Procurement Postcard for general awareness

- **Executive Summary**
- **Integrated Change Management and Communications Approach**
- **Change Management Strategy and Plan of Activities**
- **Communications Strategy and Plan**
- **Communications Planning Timelines**
  - **Strategy & Governance**
  - **Organization**
  - **Sourcing**
  - **Technology**
- **Appendix**

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Procurement's Guiding Principles

Best Value	Procure goods and services at the lowest total cost of ownership by leveraging the State's buying power using the most appropriate channels to deliver economic value for North Carolina taxpayers
Customer Focus	Address all stakeholders' business needs and manage their expectations in a timely, informative, and responsive manner
Delivery Excellence	Develop, maintain, and execute standardized, repeatable procurement processes and procedures across the procurement function – supported by technology where appropriate – to achieve targeted business outcomes
Compliance and Accountability	Enforce compliance with statutes, administrative codes, executive orders, and policies while providing appropriate transparency for stakeholders through monitoring, measuring, and reporting activities
Operational Efficiency	Align people, processes, and technology to optimize the procurement function against defined procurement goals and metrics
Workforce Excellence	Maintain a workforce with the right knowledge and skills to be viewed as a trusted partner on procurement related issues to achieve targeted business outcomes
Strategic Planning	Strategically plan procurement activities using a proactive and collaborative approach to optimize the return on investment for the State of North Carolina

Stakeholder – High Level Analysis

Category	Stakeholder Group*	Impact	Scope of Influence / Responsibilities for Project Success
External	Public/Taxpayers	Low	• Targeted in terms of general awareness to receive information about Procurement Transformation pertinent to address the why, what, who, how, and communicate expected benefits of the overall effort, the potential changes, and provide details around the impact to them. *Impact varies based on current authorities and total FY10 purchases*
	Vendors	Medium	
	Associations	Low	
	Media	Low	
Government Agencies	Legislature	Low	
	Local Government	Low	
	Community Colleges	Medium	
	Local Educational Agencies	Medium	
	University System	Low	
	Executive Branch Agencies	Varied*	
Employees	Procurement function employees	High	• Understand how program results will achieve business objectives • Engage individuals to support activities regarding potential changes to Authorities /Policies/Roles & Responsibilities/Processes & Procedures/Technology
	Employees receiving goods and services		
Leadership	Executive Leadership	Medium	• Lead, influence, and advocate for the project across multiple domains • Develop and maintain relationships among stakeholder groups • Provide decision making authority and direction • Set common vision and context for the project • Cascade messages
	Executive Steering Committee		
	Executive Agency Leadership		
	Advisory Committee		
Project Team	Agencies and employees directly involved in executing project activities including people, process, and technology implementation	High	• Understand new guiding principles and articulate to others • Understand how project results will achieve business objectives • Inform stakeholders of changes, communicate timelines, and provide support • Direct individuals within their organization to take on related activities • Cascade messages

Change Readiness Survey – Executive Summary

Following is a summary of the analysis and observations from the Change Readiness Survey:

Vision and Leadership

- Overall, individuals indicated they understand why procurement needs to change, but generally disagree leadership is attempting to involve employees in the change.
- Only 50% of all respondents think the vision for transformation has been well communicated and a significant number of responses indicate there is an issue with being kept informed and up-to-date regarding changes impacting their work. ***This should be a watch area moving forward with Procurement Transformation.***

Action and Alignment

- A significant number of respondents indicated the authority and responsibility for changes is not always clear and agree statutes and rules are not consistent and easy to follow.
- Respondents generally disagree they are organized to effectively and efficiently execute responsibilities.
- Respondents generally indicated technology is not adequate to support procurement processes.
- Nearly 90% of respondents from all organizations indicated replacing outdated processes and procedures is needed to improve the procurement function.
- While almost 90% of respondents indicated working with people in other functional areas is effective, there is only moderate cooperation when implementing changes.

Change Readiness Survey – Executive Summary

Adaptability and Change

- A significant number of respondents indicated they feel comfortable asking questions if they don't understand.

- A majority of respondents recognize there will be challenges and uncertainty during the transformation.

- There is significant recognition from all respondents there is a need to change what they do.

- Respondents consider themselves flexible and enjoy learning new things and acquiring new skills.
    - Almost 100% of respondents indicated they are flexible when faced with changes; this drops to 94% for those with more than 15 years in their position.
    - Almost 100% of all respondents indicated they enjoy learning new things and acquiring new skills; this drops to 90% for those respondents with more than 15 years in their position.

Involvement and Collaboration

- A significant number of respondents indicated they have an informal network which includes people from various agencies.

- Respondents indicated working with people in other functional areas is effective, however, cooperation in making changes is challenging.
    - Between 70-80% of respondents with their primary focus on core procurement tasks regularly offer new ideas on ways to do business and most indicated management values their opinion.
    - More than 94% of respondents with their primary focus on core procurement tasks indicated they are the person others look to for help.