



maestro 2.X

*Orchestrating Advanced Solutions
to Exploit Integrated Clinical Data*

MAESTRO Change Agent Network (mCAN) Strategy



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1 INTRODUCTION

The MAESTRO Change Agent Network (mCAN) was successfully used in MAESTRO Release 1.1. The mCAN team is a group of change champions who work with the MAESTRO CaTM (Change and Transition Management) team and other workstreams to gain very detailed knowledge of all facets of the MAESTRO Program. With that insight and knowledge, they are an effective communication link between the sponsors, project team, and those most directly impacted by the change.

The mCAN team will be a medium that disseminates MAESTRO program information to stakeholders in their areas of influence during MAESTRO Release 2.X. They will be a communication tool to reach out to everyone who is impacted by the change. They will also provide feedback to the MAESTRO Program team, underscoring issues and concerns that they are dealing with in the workplace.

The team will also serve as a sounding board and review checkpoint for MAESTRO messaging content and delivery tactics developed in the Case for Change. Since they work side-by-side with those impacted by the changes, they have a unique insight into their needs and receptivity to messaging content and media. Also, as subject matter experts, they are capable of providing valuable suggestions.

The mCAN team is a very important communications tool during the time of greatest changes brought about by the MAESTRO program. Unlike the earlier MAESTRO releases, the 2.X releases happen in conjunction with other initiatives such as Unify. The mCAN team can help communicate MAESTRO's relationship and shared functions with Unify and other such programs to their peers.

The mCAN team, like many other components of the Change Management Strategy, must be flexible and repeatable to work across multiple releases in the MAESTRO 2.X Roadmap. As with all stakeholders, the mCAN team will have varying levels of involvement in the individual 2.X releases. However, they should have a relatively consistent level of engagement with the CaTM team regardless of their level of involvement in a specific MAESTRO release due to their role as agents of change.

The following sections address how MAESTRO 2.X mCAN team will be re-engaged, augmented as necessary, and strategically employed in the MAESTRO release 2.X.

2 FUNCTION OF THE CHANGE AGENT

mCAN team members are advocates who will help the stakeholders understand the value of the MAESTRO program and its components and build acceptance for the coming change. They will be one of the many mediums used to communicate the Case for Change. The Functions of a Change Agent are to:

- Contribute to the development and delivery of the Case for Change for MAESTRO as a whole and for their functional area in particular
- Share authorized information with others in their area of influence
- Educate others about the change process and how it will affect them
- Provide informal day-to-day communication to the team
- Clarify the role of the MAESTRO project in the larger context of clinical technology convergence (Unify)
- Provide feedback to the CaTM team about how the changes are being accepted and working in practice
- Quell rumors and actively support the transformation
- Act as a role model by remaining highly motivated, committed, and positive
- Listen to peer's thoughts and feelings about the program, products, and process

3 CHANGE AGENT NETWORK COMPOSITION, ROLES, & RESPONSIBILITIES

The MAESTRO mCAN team will contain representation from the following groups for each of the client companies:

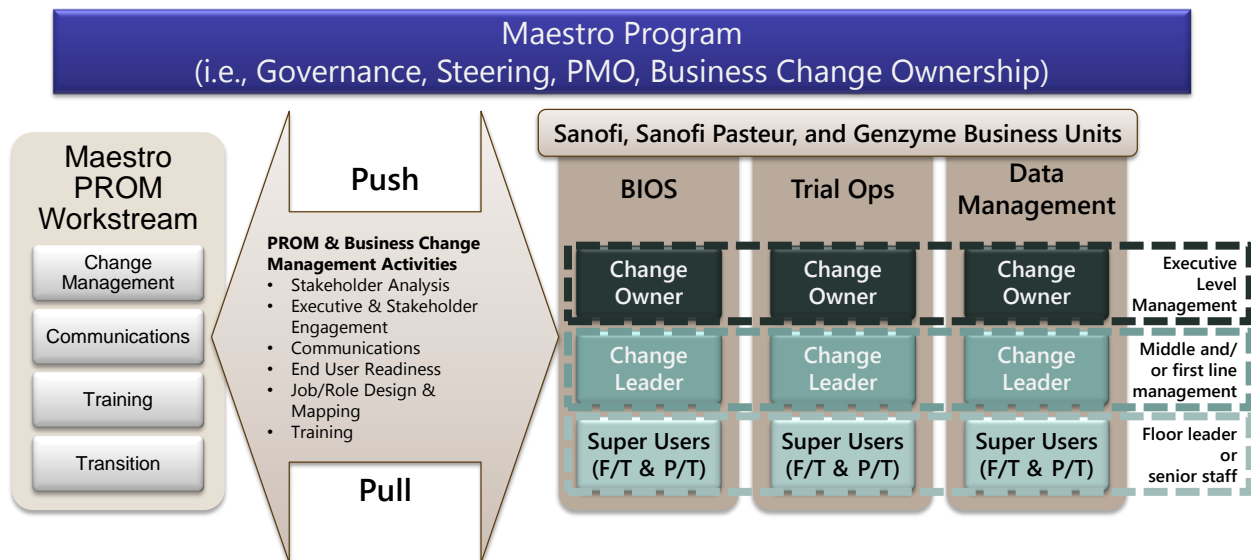
- Statistics & Programming
- Trial Operations & Management
- Data Management
- Clinical Development
- Medical Operations
- Clinical Studies Unit
- Quality & Continuous Improvement
- Technology & Information Systems groups
- Global Pharmacovigilance and Epidemiology
- Therapeutic Business Units
- Regulatory

Three representatives are needed from each department, from each company, to fill each of these roles:

- Change Owner – typically executive level management
- Change Leader – typically middle and/or first line management
- Super User – typically floor leader or senior staff

These representatives will make up the mCAN team. They will work collaboratively with the MAESTRO CaTM workstream team.

Integrated Change Agent Network



The mCAN team is a cross-company, cross-functional matrix organization. The three roles are filled from the company business units directly impacted by MAESTRO 2.X releases. The Roles & Responsibilities of the Change Owner, Change Leader, & Super User are as follows:

Change Owner	Change Leader	Super User
<ul style="list-style-type: none"> • Accountable for the execution of Change Management activities • Actively participates in the development and delivery of the Case for Change • Demonstrates active and visible change leadership • Accountable for the completion of Change Management local deliverables • Accountable for affecting change • Engages other leaders to ensure leadership alignment • Appoints Change Leaders • Cascades communication to line leadership • Plays an active role in the Program Governance & Steering committee 	<ul style="list-style-type: none"> • Executes Change Management activities • Actively participates in the development and delivery of the Case for Change • Executes Change Management local deliverables • Responsible for affecting change • Leads and facilitates change activities • Uncovers and escalates need for communication, education, and leadership involvement • Responsible for the new SOP and Process Updates • Cascades communication to the subordinates • Helps plan and coordinates training logistics / delivery • Plays an active role in the PMO 	<ul style="list-style-type: none"> • Helps carry-out Change Management activities • Actively participates in the development and delivery of the Case for Change • Uncovers and escalates need for communication, education, and leadership involvement • Guides end users through business process activities • Represent end users' needs for information, training etc. • Develop new SOPs & Processes • Plays an active role in contributing to solution definition, development, & validation. • May initially responds to end user requests, problems, issues, etc. • Initially attempts to troubleshoot problems

The mode and methods of engagement within each of these levels will be determined individually. Each mCAN team member will have their own preferred communications style. The CaTM team will provide and suggest best practice approaches and techniques. Each mCAN team member can apply those as they are most comfortable and as they perceive value in applying them. A successful mCAN team member will increase the commitment levels of their stakeholders, generate buy-in for the new way of working, and instill a sense of ownership for the new status quo. There are many ways a mCAN team member can be successful.

The role of the MAESTRO CaTM team is to:

- Lead development of Case for Change messaging and tactics
- Guide the Change Management effort

- Orchestrate Change Management communications and awareness activities
- Drive the completion of Change Management activities and deliverables
- Provide templates, tools, techniques, best practices, etc.
- Offer Change Management subject matter expertise
- Develop interventions, mitigation plans, and action plans

4 CHANGE AGENT NETWORK – MANAGEMENT PROCESS

The key events that in the MAESTRO Program's Change Agent Network organization and management are:

- Confirmation of existing mCAN team member participation
- Identification of necessary new mCAN team members
- Change Agent Network Orientation session(s)
- On-going mCAN team engagement

4.1 CHANGE AGENT NETWORK ROSTER AND RECRUITMENT

The current roster for the mCAN team includes 76 names. Most of these names are carryovers from MAESTRO release 1.1. A few new names have been added from volunteers who have stepped forward over the last several months.

The individuals on the current roster need to be contacted to make sure they are still willing to be a member of the mCAN team and secondly to make sure they are still in the same or a similar job role.

After the current roster is verified, any gaps need to be filled. Candidates may be found from the current stakeholder list and/or by department/business unit heads. Also, candidates may be solicited or recommended from the business.

4.2 mCAN TEAM ORIENTATION

Upon the release of the approved MAESTRO 2.X Roadmap it will be appropriate and necessary to begin orienting the mCAN Team members to the 2.X Roadmap and other topics relevant to their role as mCAN team members. This orientation will most likely not happen in any one day or in one session. This is because not all of the information will be available immediately. However, a more important reason for spreading the orientation over several sessions is to provide an opportunity to reinforce the message several times and to give the mCAN Team members an opportunity to assimilate what they are learning, formulate questions, and solicit feedback from their areas of influence.

The following is a general outline of what needs to be conveyed to the mCAN Team members:

- Introduction to the Change Agent Network
- Review of Lessons Learned in MAESTRO Release 1.1 mCAN
- Overview of the MAESTRO Program
- Overview of the MAESTRO Products and Capabilities
- Briefing on the Business Value of MAESTRO Products
- MAESTRO 2.X Roadmap
- What's in each of the 2.X Releases
- Role of mCAN Team Throughout Release 2.X and Within Individual Releases

- Introduction to Case for Change
- Overview of the Before & After Processes and Key Impacts
- Overview of the SOPs and QD Relevant to Groups
- MAESTRO's Relationship & Engagement with Unify
- Stakeholder Review
- Communications Plan
- Tools & Resource for mCAN Team
- mCAN Relationship and Interaction with MAESTRO User Group (MUG)
- mCAN Team Action Plan

This information will be archived to be available in the event any new mCAN Team members are added during the MAESTRO 2.X program.

4.3 mCAN TEAM ENGAGEMENT

Engagement with the mCAN team members will begin during recruitment. For those team members continuing in their role as mCAN team members, their confirmation of participation starts their engagement. As new team members are identified via recommendations or solicitation and they make a commitment to be mCAN team members, their engagement will begin.

All mCAN team members will participate in the MAESTRO 2.X mCAN team orientation. This will be the kickoff event for the team. Orientation will likely be spread over at least two sessions and more likely three. Prior to the orientation, some determination needs to be made regarding the need to baseline the change management skills of the group. If this needs to be done, some portion of the orientation will be devoted to that skill development and enhancement process.

Once orientation is complete a schedule of regular meetings will be developed and posted. These meetings will focus on updates, information sharing, next steps, etc.

Another level of engagement will be provided through on-going content creation and deployment. mCAN team members will be solicited for messaging content feedback. As content is finalized it will be posted to the mCAN team SharePoint site in addition to whatever media or channel is used for distribution. The availability of the new content will be announced via e-mail and other updates. Additionally, during the mCAN team orientation it will be suggested that team members set up SharePoint Alerts on the mCAN resource site so they get notifications of any new postings and/or updated content.

The Yammer enterprise social network will be used also. The following accounts are envisioned:

- mCAN – MAESTRO Change Agent Network – private group
- MUG – MAESTRO User Group – public group
- SafirUG – Safir User Group – public group
- Other product specific groups as needed – public group(s)

The mCAN group will be private for mCAN team members only. All members will receive an invitation to join the group. Prior to those invitations going out some content will be preloaded to the site. The mCAN Yammer group site will not be used as a file distribution mechanism or file storage location. Content will focus on engagement topics. mCAN team members will be encouraged to share experiences and discuss issues of common concern. Some example initial discussion topics could include the following:

- For those in our group who were mCAN team members during MAESTRO R 1.1 can you share some your experiences?
- What skills are crucial for a successful mCAN team member?
- How can a mCAN team member foster engagement with their peers?
- What is the most important lesson you have learned as a change agent?
- Poll: How would you rate your fluency in the change management process:
[Note: used to baseline groups perceived fluency in change management]
 - 1 – Not fluent at all
 - 2 – Low fluency
 - 3 – Moderately fluent
 - 4 – Fluent
 - 5 – Very fluent

As mCAN team members become engaged with their areas of influence, the mCAN group will be a perfect forum to highlight and CaTMote those successes. Also, as the various MAESTRO releases are deployed, there is additional opportunity to develop and encourage discussion around best practices and lessons learned.

The MAESTRO, Safir, and other product specific Yammer groups will be public. Anyone on the client network will be able to join those groups. It is assumed that primarily actual users or interested staff will join them. These Yammer groups will focus on engagement also. They will be a vehicle for sharing tips and tricks and best practices for the products. Since they provide a two-way dialog they will be vehicles for collecting user suggestions for enhancements, determining where additional training may be needed, gauging product usage, etc. mCAN team members will be encouraged to join and participate in these user groups to serve as product experts and to assess user feedback and perceptions.

5 RESOURCES FOR A CHANGE AGENT

To enable the mCAN team to successfully carry out their role, the CaTM team will provide a number of avenues of support and resource materials. The resource materials will be assembled from the Case for Change inventory of content. Since that material is highly customizable many of the resource materials will be similar but uniquely targeted for a particular mCAN team member's area of influence.

General resources will include:

- Regular online meetings/briefing sessions for mCAN team
- Advance demos and training on MAESTRO release functionality

Access to program resources and SMEs to address specific questions and concerns:

- MAESTRO program and tool-specific intranet webpages [TBD: CS&O or TIM based]
- MAESTRO 2.X project SharePoint site (CaTM) resources (mCAN Toolkit)
- General MAESTRO 2.X presentations, posters, flyers, handouts, etc.
- Yammer group (tentatively mCAN / MAESTRO Change Agent Network)
- Opportunities to participate in general MAESTRO events such as open house, town hall, demo, lunch & learn, etc.

Support from CaTM team in dealing with specific situations such as resistance to change, presentation content and structure, communication planning, and stakeholder management

Additionally, there will be release specific resources available:

- Online meetings/briefing sessions for subsets of the mCAN team with direct involvement in a particular release
- Case for Change content inventory will contain release specific content components and assembled content that will be accessible by mCAN team members
- Access to MAESTRO team leads and project team members to support unique needs

As releases occur additional content may be created. Best practices and lessons learned content may be added. User feedback may generate a need for new or updated content. During or shortly after a release, user testimonials, short video clips demonstrating actual value in using MAESTRO features, and other persuasive content can be created and added to the mCAN Team resources.

6 CHANGE READINESS ASSESSMENT

As Change Readiness Assessments are conducted the mCAN team members for the impacted areas will be heavily involved in discussions, assessments, and readiness checklist development. The readiness checklist will be specific for each impacted stakeholder group. That list will include making sure that all training is complete or will be complete, support processes are identified and communicated to those impacted, all group members have been notified, and other release specific items as needed.

The checklist will be reviewed with the stakeholders in the impacted group along with mCAN team members and the training team. The checklists contain a number of standard items but the Change Readiness Assessment will provide a mechanism to identify specific items that need to be addressed for each impacted group. Any groups with potential readiness issues will be solicited for additional mCAN representation if needed.

7 CHANGE AGENT BEST PRACTICES

The following items will be posited as best practices for the mCAN team members. Each best practice is or will be supported by one or more elements of the Change Management strategy.

Best Practice #1 – Make the Case for Change

Use the Case for Change for each audience to convey the “what's in it for me” message. Also, use that as the context for the larger MAESTRO program Case for Change.

Best Practice #2 – Communicate Early, Often, and Richly

Convey your Case for Change messages often and in many ways. Early messages can be “teasers” to arouse interest and curiosity. Remember that not everyone hears or reads the same message the same way. Say your message in different ways. This is true of media also. Use multiple channels and media to distribute your message. Make sure everyone hears or sees the message, multiple times, in multiple ways.

Best Practice #3 – Treat Everyone as a Target

Don't assume that leaders and managers are aligned simply because of their position. These people have the same concerns as everyone one else in regards to what the change means to them.

Best Practice #4 – Leverage Those Who Buy-in

As people buy into your message use them to your advantage. Ask them to help spread the message and garner support among their peers. Ask them to speak or present at an event you host. Ask if you can quote them in one of your messages.

Best Practice #5 – Cultivate Credibility

Try to demonstrate benefit and “what's in it for me” statements with samples, demos, testimonials, and other hard evidence. Be consistent in your messaging. Also, be honest about any downside or risk.

Best Practice #6 – Leverage the mCAN Team

Learn from your fellow mCAN team members. What are they doing that is working? What is not working? Share your experiences and successes with the team too.