



MAESTRO 2.X

Change Management Strategy



Table of Contents

- 1 Introduction 3
 - 1.1 Unique MAESTRO 2.X Challenges 4
- 2 MAESTRO 2.X Change Management Approach 5
- 3 Defining the Vision..... 5
 - 3.1 Recommended Changes to the MAESTRO Tagline and Vision..... 6
- 4 Building the Case for Change (CfC) 7
- 5 Stakeholder Engagement 8
- 6 Change Readiness Assessment 9
 - 6.1 Change Agent Network..... 10
 - 6.2 Readiness Checklist 10
- 7 Communications and Awareness 10
- 8 Training 12
- 9 Change Management Schedule..... 12

1 INTRODUCTION

Change Management encompasses a variety of activities and processes. The overall objective of Change Management is to ensure that the introduction of and transition to new procedures, processes, systems, workflows, and organizational structures occurs smoothly with a minimum of unanticipated impact on business and the affected individuals.

Change Management has numerous interrelated aspects including:

- Vision & Sponsorship
- Stakeholder Engagement
- Organizational Readiness
- Communications
- Knowledge Transfer and End User Training
- Measurement and Reporting of Change Management KPIs / Metrics

Change Management is an integral part of project execution and as such is dependent on other project tasks and artifacts. The Change Management strategy also drives subsequent project tasks. The graphic below shows the high-level activities leading up to and following Change Management Strategy.



The need for Change Management arises because of an initiative or project, while providing benefits, also has an impact on the professionals working in the organization. The initiative or project has executive sponsorship. That sponsorship results in a business case that provides financial and organization benefits. The first challenge of Change Management is to translate that business case into a compelling vision and incentive to accept the impending change.

The project scope defines what is changing. This begins to define where in the organization impacts will occur. It also begins to identify who is impacted, which expands the pool of project stakeholders.

Effective Change Management is driven by understanding the initiative's stakeholders. The term Stakeholders is used broadly to include sponsors, project team members, business subject matter experts, and the professionals who will be impacted by the initiative. Stakeholders must be identified, analyzed, engaged, and monitored.

With an understanding of the stakeholders and the scope of the initiative, another major component of Change Management is a Change Readiness Assessment. There are varying degrees of impact on stakeholders. Understanding what those impacts are allows for the assessment of gaps that must be filled or narrowed before change is implemented. Those gaps can range from the easily identifiable, such as skills or training, to the more subtle and complex, such as apathy or lack of buy in and outright opposition to the change.

A major tool to drive Change Management efforts is communications. Communications are directed at stakeholders. They are the audience. A stakeholder can be in more than one audience. Each communications has a purpose. It is directed at one or more audiences and intended to achieve specific objectives.

Knowledge transfer is the effective and efficient handover from the project team to the operating units. This includes the transfer of necessary documents and support materials, training operating unit staff, and the reassignment of responsibilities. End-user training is a part of knowledge transfer but is usually treated as a separate component. End-user skill and knowledge gaps are assessed well in advance of implantation to identify exactly what training end-users need. Ideally training is delivered at just the right time, in just the right amount, and in just the right format.

1.1 UNIQUE MAESTRO 2.X CHALLENGES

There are two challenges for MAESTRO 2.X Change Management. The first is the need for a repeatable process that can be executed for each release in the MAESTRO Roadmap. Ideally, that process will have common core elements that make MAESTRO a "brand" that is recognized regardless of the focus of any particular release. The second is repeating that process effectively by engaging the stakeholders for each release. Not every stakeholder is impacted by every MAESTRO release. If a stakeholder is not impacted by a particular release we do not want to ignore them nor do we want to overly engage them for changes that do not really impact them.

An additional issue is the close relationship between the Unify and MAESTRO initiatives. MAESTRO Change Management must be cognizant of Unify Change Management activities and how they impact MAESTRO stakeholders.

The following sections address how MAESTRO 2.X Change Management will be strategically designed and accomplished.

2 MAESTRO 2.X CHANGE MANAGEMENT APPROACH

MAESTRO Release 1.1 included many Change Management activities, processes, and tools including:

- Stakeholder Identification and Analysis
- Communication Plan
- Change Agent Network
- MAESTRO User Group (MUG)

There were also a number of artifacts created to support the communication, awareness, and training aspects of Change Management. Some examples include:

- Targeted presentations
- Logo and branding
- Graphics
- Posters

MAESTRO 2.X will reuse much of the Release 1.1 Change Management material. Some will be updated or adjusted as necessary. Some materials such as the audience specific presentation obviously need to be redone due to content changes. New Change Management components to be added for MAESTRO 2.X are:

- Change Management Strategy (this document)
- Case for Change
- MAESTRO User Group (MUG) Strategy

Specific artifacts will be created to support the Change Management Strategy. These will be components of specific parts of the strategy such as Communication and Awareness.

Examples of these artifacts include:

- On-line presentations
- Posters / Flyers
- Newsletters
- E-mail broadcast messages
- Promotional giveaways (SWAG)
- Social media (Yammer) engagement

Details about these will be in specific plans where they are used. They may be in more than one plan. For example, the use of the Yammer social media application will be a tool for Communications, Change Agent Network, and MAESTRO User Group strategies and plans.

3 DEFINING THE VISION

Selling change at the individual level is very much a “what’s in it for me” proposition. There may be a number of incentives for an individual to accept or embrace and change. It could be easier access to data, more accurate results, ability to quickly publish results, lower error rates, less rework, etc.

Creating organizational awareness and positioning change within an organization requires a vision. A vision statement articulates a direction or desired end state. It provides the foundation for the change.

The “Long Term MAESTRO Vision” was communicated in two variants during Release 1.1:

“Establish a computing platform of our standardized clinical data to support objectives of safety analysis, benefit risk assessment, and enhanced analytics.”

and,

“To help incrementally realize maximum value from our clinical data in support of our objectives for safety analysis, benefit risk assessment, and enhanced analytics by 2013.”

Some of the vision was realized in release 1.1. More will be realized in release 2.X based on re-focused benefits. Neither vision statement is all encompassing in addressing the full range of benefits and opportunities MAESTRO is intended to provide.

The MAESTRO 2.X business case provided benefits in four major categories:

- Optimized Linear Data Flow (LD)
- Automated Business Partner Connectivity (AC)
- Enhanced Data Visualization and analytical capabilities (BR)
- Improved access to aggregated and pooled Clinical Data (CD)

These benefits will become available in various 2.X releases as established in the MAESTRO Roadmap. Those impacted by a release and the resulting benefits will vary from release to release. As mentioned in the Introduction, a challenge in MAESTRO Change Management is maintaining messages that are consistent across releases but still focused on the specifics of a particular release. This increases the need for a compelling vision that is consistent across all releases.

Another effective “branding” element of MAESTRO 1.1 was the tagline, *“Orchestrating a Technical Solution to Exploit Integrated Clinical Data.”* This tagline successfully used the verb *orchestrating* as a play on the MAESTRO name. It also incorporated a result, *integrated clinical data*, and positioned MAESTRO as a *solution*.

3.1 RECOMMENDED CHANGES TO THE MAESTRO TAGLINE AND VISION

Since MAESTRO encompasses more than just technology, it is recommended that the tagline be changed slightly to:

Orchestrating Advanced Solutions to Exploit Integrated Clinical Data.

A change in the vision statement is also being proposed. The change ties the vision statement to the tagline above. It also addresses long-range goals rather than specific operational objectives. The wording changes make it more clear what MAESTRO is doing and how. The proposed vision statement is:

“MAESTRO will orchestrate advanced solutions to exploit integrated, standardized clinical data by incrementally delivering enhanced data visualization and analytics tools that support operational effectiveness and improved decision making.”

4 BUILDING THE CASE FOR CHANGE (CFC)

The vision statement addresses two broad benefit categories, operational effectiveness and improved decision making. It does not address the specific benefits that will encourage acceptance at an individual or small group level. The business case objective is to demonstrate financial feasibility and company benefits of MAESTRO.

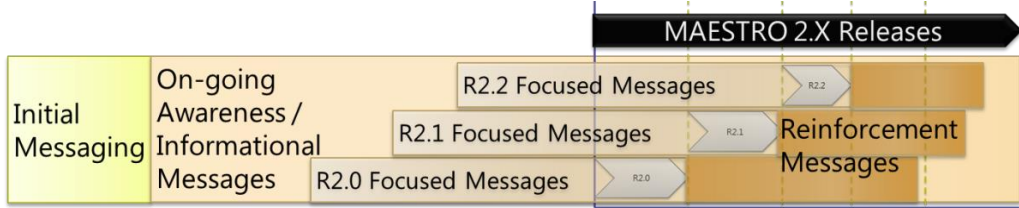
The Case for Change is designed to bring meaning, understanding, and value to business people and users. It answers the questions, “why are we doing this”, “when will it happen”, “how will it work”, “how does it impact me and my role”, and “what is the value to me and the organization”.

MAESTRO 1.1 introduced two major components, the Clinical Data Hub (CDH) and SAFIR the **SAF**ety **I**nteractive **R**eview reporting and analytics tool. Release 2.X will introduce new components of the overall MAESTRO solution. These components address specific business needs. They are also the touch points where stakeholders and users are impacted. As each release occurs a different audience is impacted.

The Case for Change has to be communicated to those who will be impacted. In addition to an initial message or messaging blitz to make the audience aware of what to expect, there must be on-going communication that reinforces the Case for Change but builds on the MAESTRO story. These messages may delve more deeply into benefits, address timing/transition, or engage the audience with content that makes them more aware of what it means to them.

As releases are deployed there will be opportunities to communicate success stories and best practices. Even after the change has occurred, reinforcement messages are necessary to maintain momentum and continue to highlight the reasons for the change. Reinforcing the Case for Change after the change occurred helps ensure those impacted by the change know they have not been forgotten and that their buy-in and participation is important.

The diagram below depicts how Case for Change messaging will be distributed throughout the entire MAESTRO 2.X Roadmap.



The same type of pattern will be followed for other communication and awareness tools including these examples:

Events	Physical Media	Digital Media
<ul style="list-style-type: none"> • Town Hall events • Open house • Awareness sessions • Q&A sessions 	<ul style="list-style-type: none"> • Posters & Flyers • Newsletters • Fact sheets 	<ul style="list-style-type: none"> • MAESTRO website • Social (Yammer) • E-mail broadcasts • Online briefings / presentations • Recorded events

Each of these will be used at a high level for broad MAESTRO awareness and change management activities and also at a more granular level for each release. Timing will also be focused on the overall MAESTRO and Release specific schedules. See Section 7 Communication and Awareness for more detail.

5 STAKEHOLDER ENGAGEMENT

The Stakeholder Identification and Analysis performed for MAESTRO Release 1.1 is the starting point for an updated listing and analysis of Release 2.X stakeholders. The Release 1.1 listing identified the following stakeholder groups:

- Various units within the R&D organization that benefit from the MAESTRO Program solution.
- Steering Committee members who are interested in ensuring that the program solution meets the business requirements within the approved budget and according to schedule.
- PMO members who are interested in the successful implementation of the Program deliverables according to the business needs and requirements.
- Project and Workstream Teams who are interested in the successful execution of the activities necessary to deliver a user friendly, understandable, practical, and beneficial solution to the business stakeholders.
- MAESTRO User Group (MUG) members who are currently supporting those compounds identified in Release 1.1 and are interested in ensuring the development and deployment of a user-friendly and practical solution.
- General user community and any other group or individual within or outside of the organization whose day to day job responsibilities may be impacted by the MAESTRO solution and changes in associated business processes.

This listing has already been updated with new stakeholder for Release 2.X and will be updated as new stakeholders are identified for each release. Additions to the groups above include:

- Governance Committee
- Change Agent Network (CAN)

In Release 1.1 Stakeholders were grouped into four categories that reflected their communications needs:

- Key Players - Manage them closely and keep them fully engaged
- Important Stakeholders - Keep them satisfied. Don't burden them with too much detail
- Affected Stakeholders - Keep them informed. Communicate regularly to check that no major issues are appearing
- Other Stakeholders - Monitor them. Communicate, but do not burden them with too much information

In reviewing this list, over 80% of the stakeholder groups were in the Key Player and Important categories. This is not surprising or unusual. Looking at a stakeholder's influence or importance is not necessarily the best strategy for organizing stakeholders into audiences. For this reason, in Release 2.X, MAESTRO stakeholders will be categorized to organize them into audience groups for each MAESTRO 2.X release and for project communications purposes. As a member of the stakeholder list, each stakeholder will be part of the overall MAESTRO awareness and communications announcements. The stakeholder categories will be used for specific targeted communications.

The Stakeholder list provides an overall audience for broad MAESTRO communications and awareness. The smaller targeted audiences within the list will be used for creating Change Readiness Assessments, targeting Case for Change communications, and distributing release specific awareness and communications materials.

6 CHANGE READINESS ASSESSMENT

A Change Readiness Assessment evaluates an organization, business unit, or workgroup in terms of their readiness for a pending change. Readiness will be defined for this purpose as an evaluation of the group's "skill" and "will" in relation to the pending MAESTRO changes. Skills readiness answers questions such as these. Are there skill or training gaps that must be filled? Are those gaps related to technology and/or process? How large is the gap? Can the gap be closed or is this a staffing issue?

The other part of this assessment is the "will" to change. Has the group accepted or even embraced the pending change? Why is the group resistive? Does the group have the right incentive to change? Can additional incentives be applied? How extreme is the resistance? The Case for Change will proactively address many of these questions.

A Change Readiness Assessment looks at people, process, and technology. This is a shifting landscape that can be difficult to measure precisely. For example, a process change may be a major improvement for those who perform it. Those impacted may be very supportive of the change. But if the technology that supports it is difficult and requires a steep learning curve, their support may falloff producing adverse results.

A Change Readiness Assessment is developed initially based on the high-level project scope as defined by the as-is and to-be processes and the initial solution/technology concepts. With this information it is possible to determine who will be impacted and what some of the potential gaps are. There is usually enough information to begin meeting with groups to begin the assessment.

These meetings should include participation by representatives from communications and training. Both of these functions will provide input into the Change Readiness Assessment and will ultimately be producing content to address readiness gaps.

The meetings with impacted groups will also include any Change Agent Network members in those groups. If there are no Change Agents in a group it will be a good opportunity to solicit members. The CAN from MAESTRO Release 1.1 is still in place and some new names have been added for Release 2.X. Adequate representation is needed from all groups but any groups with potential readiness issues should be solicited for additional CAN representation.

6.1 CHANGE AGENT NETWORK

The MAESTRO Change Agent Network is a group of change champions that will work with the Program’s Change and Communications Team, to gain very detailed knowledge of all facets of the MAESTRO Program. They are an effective communication link between the sponsors, project team, and those most directly impacted by the change.

The agents will be a medium that disseminates all MAESTRO program information to their areas of influence. They will be a communication tool to reach out to everyone who is impacted by the change and also provide a feedback channel to the MAESTRO Program, highlighting issues and concerns that they are dealing with in the workplace.

The Change Agent Network is a very important communications tool during the time of greatest changes brought about by the Program. Unlike the earlier MAESTRO releases, the 2.X releases happen in conjunction with other initiatives such as Unify. The Change Agents can help communicate the scope and objectives of the MAESTRO program and its working relationship and shared functions with Unify and other such programs.

The Change Agent Network, like many other components of the Change Management Strategy, must be flexible and repeatable to work within the multiple releases in the MAESTRO 2.X Roadmap. As with all stakeholders, the Change Agent Network members will have varying levels of involvement in the various 2.X releases. They should have a more consistent level of engagement though because they are receiving information and passing that information on to the Change and Communications teams.

6.2 READINESS CHECKLIST

Prior to a MAESTRO 2.X release the impacted groups will be reviewed against a readiness checklist. 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 CAN agents 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.

7 COMMUNICATIONS AND AWARENESS

Communications and awareness have already been mentioned several times. They are integral to successful change management. Communications and awareness are interrelated but are approached differently in many cases.

Increasing awareness involves communications, but messages are broadcast more widely and not necessarily focused on a particular audience. The emphasis tends to be on “reach” or wide dissemination of the message. The specific media used for the messages usually determine how successful that reach is. There are exceptions to this way of applying awareness. At times it may be necessary to increase awareness of a particular topic to a specific audience. In those cases it is important to make sure audience gets the message.

Communications tends to be more message and audience focused. The nature of the MAESTRO project with multiple releases requires that awareness building and communications occur over several cycles. Maintaining consistency across the entire 2.X release cycle is critical.

A detailed Communications Strategy will be created and updated for the various MAESTRO releases. The high level communication and awareness objectives are:

- Promote awareness of MAESTRO and incremental MAESTRO enhancements to current and potential stakeholders.
- Communicate consistently to establish MAESTRO’s brand awareness and recognition.
- Identify stakeholder communication needs and tailor the Communications Strategy to those needs.
- Provide timely and relevant communication to all audiences.
- Encourage stakeholder feedback and collaboration.
- Provide effective program communication to support change management activities in order to minimize disruption to the business.

The Communications Strategy will address expanding the scope and impact of MAESTRO messaging. The communications channels to be used will include those mentioned earlier:

Events	Physical Media	Digital Media
<ul style="list-style-type: none"> • Town Hall events • Open house • Awareness sessions • Q&A sessions 	<ul style="list-style-type: none"> • Posters & Flyers • Newsletters • Fact sheets 	<ul style="list-style-type: none"> • MAESTRO website • Social (Yammer) • E-mail • Online briefings / presentations • Recorded presentations

The goal of the communications and awareness effort is for all stakeholders to see the messages they need to see in multiple ways. For example a stakeholder being impacted by the Benefit Risk Analysis release might first learn about MAESTRO’s upcoming enhancements from a poster. They may see another mention a short time later in an e-mail newsletter. The same day they might see a third mention of it on the CS&O intranet site.

A second goal is for all stakeholders to get just enough information, the right information, at exactly the right time. Using the example above, sometime later the person may read more details about the coming change in an article in a newsletter delivered to their inbox. As the change comes closer they may attend an open house event and see a demo conducted by their CAN team member. Just before the release is to go live they attend training. All of these messages occur at the right time so the stakeholder is gradually learning more as their need increases.

The Communications Strategy will integrate many of the specific change management components. The topics touched on earlier, vision statement, tag line, case for change, etc. are all content components that will be used throughout the MAESTRO communications program and within the individual releases.

8 TRAINING

A detailed training plan will be developed addressing overall MAESTRO program level content and delivery approaches. Additional component plans will be developed to address audience and content specific requirements for each release.

Regardless of the content delivered or the mechanism used to deliver it, it is important to make sure there are adequate support materials and resources to facilitate the transition to any new systems and/or processes.

Training course content needs to be developed for the components of each release but an important part of that content to be reinforced are the elements of the Case for Change that was developed for that release. This will serve to reinforce the benefits that were touted and hopefully demonstrate them in hands-on, interactive training.

9 CHANGE MANAGEMENT SCHEDULE

Once the MAESTRO Roadmap and schedule is developed for each of the 2.X release, the Change Management activities and deliverables will be established. They will roll up from component plans for communications, CAN, training, etc.