"Driving business change through Digital Transformation, to achieve sustainable success"

Microsoft Dynamics 365 Business Central Rollout

Industry:
Manufacturing

Region:
National, UK

Technology:
Microsoft Dynamics 365 (D365)

Timeframe:
7 month engagement

Business Change Solution:
Persona Study

Executive Summary:

Our client, a key player in the manufacturing industry, required business change support to deliver a rollout of MS Dynamics 365 across ~10 departments and 405 employees. Ensuring seamless operations across each department is essential for maintaining high levels of efficiency, precision, and compliance.

The MS Dynamics 365 rollout formed part of our client's wider digital transformation programme, with a strategy that aimed to leverage 3 key pillars - data centralisation, process efficiency, and operational collaboration. By integrating these pillars, our client has been able to optimise their operations, improve decision-making, and foster a culture of innovation and collaboration.

Business Change Challenge:
Understanding the requirements, change impact and communication needs for users across the organisation.

Business Change Benefits:
- Bridging the gap between the business and end-users
- Collaborating between the project and stakeholders
- Identifying skills gaps and departmental ways of working
- Enabling the creation of an end-user profiling blueprint to categorise user needs and roles
- Highlighting legacy issues and inefficiencies within processes

Key Deliverables:
Phase 1
- 163 user interviews + Organisation Chart
- Interview summary and analysis
- 'As is' and 'To be' Persona Study including:
    - Distribution of workforce
    - Decision Matrix
- Skills Gap Analysis

Phase 2
- Change Impact Assessment
- Communications Plan & Delivery
- Change Plan
- Change Champion Network Strategy & Implementation + Terms of Reference

Phase 1: Understanding personas

Persona development is about placing the user at the centre of the decisions surrounding the solution. It is about making sure we all remember that the technology is there to support our most valued assets – the people.

Developing personas: The personas were developed using information from different areas in the organisation. The characters developed are not real people but are inspired by real life jobs, and crucially, their ways of working. The objective of using personas is to write requirements and use-cases that will serve as inputs for defining the collaboration and communication solution for the digital transformation.
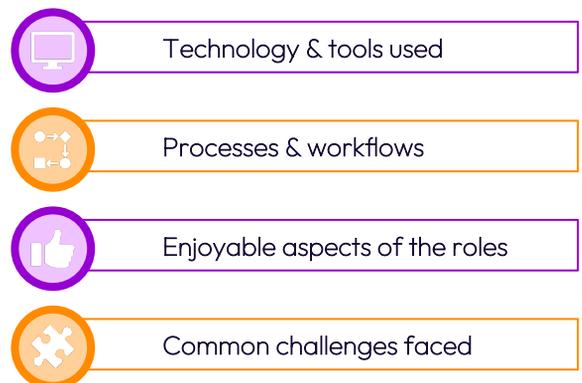
Why were they important?: Personas will then be used to measure if the expected results have been achieved throughout the project. They are the foundation we will use from which to pitch all our engagement activities.

Our approach: The approach we took was to gather qualitative data on how our client's people work. In addition to the interviews, site visits and a company-wide survey was published resulting in a 37% response rate, compared to an industry average of 10%. This was used to gain a 360° persona study, targeted to represent over 95% of the organisation and break it into representative groups by the type of work they do, not the role they perform or their geographical location.

Key output: During the Persona Study we discovered that there would be difficulty communicating with front line operatives due to their lack of access to technology. This informed our communication plan which allowed us to develop a targeted communication strategy ensuring this user group were not overlooked.

PERSONAS

- Allow tailored communications and engagement activities
- Inform technical needs
- Allow the creation of user journeys for different personas
- Inform training requirements by uncovering skills gaps
- Identify opportunities for efficiency
- Place people at the heart of change
- Give a view of current challenges

Interview outputs

Persona development relies on getting to the heart of user requirements, pain points, needs and wants. To do this, we conducted 163 interviews with end-users across the organisation. Not only did this inform the generation of the final user Personas, it also encouraged user buy-in and improved their understanding of the solutions impacts on their day-to-day role. The following themes were identified and used to inform the final user personas study:

- Technology & tools used
- Processes & workflows
- Enjoyable aspects of the roles
- Common challenges faced

This research allowed us to produce 8 'as-is' user Personas across 3 groups with similar capabilities. Each Persona included their key attributes, day-to-day activities, motivators and pain points. These informed the content, methodology and style of communication and engagement required to get buy-in, build knowledge and ensure the successful adoption of the solution.

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Phase 2: Delivering the Change Strategy

Following the delivery of the in-depth persona study, our client decided to extend the change support more than what was initially required.

As part of this support, we provided:
- Change Impact Assessment
- Communications Plan & Delivery
- Change Plan
- Change Champion Network Strategy & Implementation + Terms of Reference

Change Impact Assessment:

Before we started delivery, we conducted a Change Impact Assessment (CIA), this is a structured process that analyses how a proposed change will affect an organisation.

A CIA can provide many benefits; it identifies potential consequences on people, processes, systems, and stakeholders, helping leaders anticipate challenges and develop risk mitigation strategies.

Communications Plan:

We needed to provide the project stakeholders and end-users with a view of our communication methods and plan.

This formed our communications plan which was vital for the successful adoption of the solution.
- Raise **awareness** of the change
- Foster **desire** to make the change
- Provide **knowledge** on how to change
- Ensure the client had the **ability** to change
- **Reinforce** the change

We also created; a monthly bulletin and a trilogy of videos. This helped disperse messaging and project updates to areas of the business that had a lack of access to technology.

Change Plan:

When constructing this plan, we worked in 3 stages:

1. The first stage was to create an environment for change and process awareness, we did this by utilising the business case in order to pinpoint the benefits of this change, spreading knowledge of the change and the CIA.

2. The second stage was to communicate and apply the change via facilitating readiness workshops and training.

3. The final stage was to evaluate and improve. An evaluation is crucial to identify key achievements from the change as well as key barriers in the implementation. During this stage we also gathered feedback on how our clients' people were feeling – were they feeling confident? Or were they feeling worried?

Change Champion Network

Following the interviews conducted as part of the persona study, it became clear that a Change Champion Network would be essential to the adoption of Business Central. Champions are a valuable network made up of colleagues across the organisation, supporting their peers and advocating the successful adoption of new technologies or processes as well as providing an essential feedback loop forum. Some key issues common across all roles to support the development of the Change Champion Network that was identified, were the communication challenges experienced by colleagues:

CHALLENGES

1. Lack of clear ownership
2. Political dynamics
3. Inconsistent communication methods
4. Issue escalation

IMPACTS

Delayed responses
Reduced efficiency
Employee frustration

NEXT STEPS

To ensure buy-in and adoption of Business Central, a Change Champion Network is required. The interviews conducted clearly evidenced the need for a Change Champion Network for the solution implementation.

Using these inputs, we were able to provide the Change Champion Network with the knowledge and tools required as part of a Change Toolkit to fulfil their role, plus a terms of reference to ensure the scope and limitations of the network were understood.

The Champions went on to sell the benefits of the solution ensuring their colleagues understood that their pain points with the existing technology had been addressed, showcasing the value of implementing D365. The Champions supported the project with communicating in a way that resonated with their personal and professional concerns by: Building awareness about the change, increasing knowledge about what is changing and why, gathering employee feedback, concerns and questions, motivating employees to change their behaviour, and providing a clear point of contact for employees to learn about the change.

About Good Change People

Good Change People was established in November 2023 to challenge what traditional consultancy looks and feels like. However, some of our team have been in Business Change for over a decade! Over the years we have built valuable relationships as a result of our people-centric Change Management approach; putting people at the heart of Business Change.

Want to make sense of your organisational data and leverage it for change?

Drop an email to info@goodchangepeople.com

Or for more information visit www.goodchangepeople.com