Client Referral Letter – ERP Change Management

Metcalf & Associates came to our company to work on Phase II of our Oracle ERP implementation to create organizational change. They quickly gained credibility and support of the project leadership team including the CIO and the business leadership.

They took a holistic view of the issues we faced and made practical recommendations that could be implemented in a manufacturing environment. They made sure they delivered tangible value quickly and on an ongoing basis. As issues arose, schedules changed, and project leadership changed, they modified their approach to accommodate the changes.

They introduced novel approaches to dealing with difficult problems and was both tactful and tenacious in implementing them successfully.

Metcalf & Associates participation in the project made a significant impact on our ability to implement successfully. They created a significant portion of the foundation materials that allowed us to successfully implement the system long after she completed her portion of the project including tools such as:
- End to end flow chart that defined the entire business flow impacted by the system color coded to indicate impact of change on people and customers, high risk areas, and new processes.
- On-line tool to explain the changes to the overall organization and each job to allow everyone to have access to the same information in a timely basis.
- Redefined jobs prior to system launch to ensure employees in high impact positions would not experience significant change when the system went love.
- Created standard operating procedures for processes that would be changed significantly
- These tools were new to the Worthington culture and served the organization well in helping people transition from the old way of doing business to the new way

The table on page 2 contains a summary of business objectives and tasks Maureen was responsible for or supported.

Goal: **Operate** the Business on Day 1 with no Disruption

Objectives	Tasks and Deliverables
▪ Identify Day 1 Issues and ensure they are covered before Day 1	▪ Created Day 1 list of issues ▪ Issues list used to drive changes to the project plan and to create cultural change direction
▪ Get the right people in the right positions at the right time	▪ Staffing Plan ▪ Organization Structure discussions and recommendations
▪ Define job proficiency guidelines and ensure people have demonstrated their mastery of job requirements before Day 1	▪ Proficiency guidelines ▪ Hiring assessment criteria
▪ Define job requirements and ensure the job descriptions are created to make hiring decisions and set employee expectations	▪ Job descriptions specifying job requirements and proficiency guidelines as the beginning of rigorously managing employee and process performance
▪ Establish Day 1 metrics and achieve required level of performance before Day 1	▪ Track and report key metrics ▪ Introduce discipline of measuring ▪ Introduce discipline of using metrics to diagnose and resolve process and performance related issues
▪ Identify Day 1 people/cultural issues and recommend specific tools and actions to address the issues. Focus attention on establishing behavioral consequences, positive and negative.	▪ Talking points documents designed to convey messages tailored to discuss and provide follow-up relating to new behaviors (i.e. focus on process measures and proactive process analysis) ▪ Communicate successes to broader audience – through Project One communications successes to recognize and reinforce desired behaviors (providing a positive consequence for desired behavior) ▪ Communicate progress on Day 1 metrics thereby reinforcing the focus on metrics and process consistency across plants
▪ Create a Shared Vision of how Client will operate in the future thereby building confidence that the management team supports the project and that it will succeed	▪ Structured communication plan designed to anticipate timing and content of messaging over the balance of the project ▪ Developed presentations tailored to the information needs and unique characteristics of different audiences ▪ Coached presenters on message delivery ▪ Used team effectiveness assessment to measure team understanding and received good scores on understanding of the business imperative for Project One. ▪ Administer Change Readiness assessment to measure broader audience understanding and acceptance of the change 6 months prior to implementation
▪ Implement processes of the future to manage pace and volume of change and ensure key processes are running smoothly before system implementation	▪ Increased focus on identifying upstream causes of customer issues and advanced awareness of potential issues that would impact on time delivery ▪ Weekly review process that accelerates awareness. This awareness allows the organization to respond quickly and increases the likelihood of being able to meet customer delivery dates