Strategic Plan for Pre-SSI OCM Activities (OCM2)

Florida PALM
Planning, Accounting, and Ledger Management

Revision History

Date	Author	Version	Change Reference
12/08/2016	Brian Woods	1.0	Initial Version

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Executive Summary

The Florida Planning, Accounting, and Ledger Management (Florida PALM) Project is one of the most significant initiatives the Florida Department of Financial Services (DFS) has undertaken in recent years. While the Project currently has Organizational Change Management (OCM) Team members in place, continued leadership commitment to having a comprehensive, appropriately resourced, and well executed OCM program will be important to helping the State of Florida (State) achieve its transformation objectives over the life of the Florida PALM journey.

This continued commitment to OCM participation and involvement will position the Project Team to both identify and effectively navigate a myriad of complex changes during implementation of the new Florida PALM solution. Support from, and collaboration with, Project Sponsors, the Executive Steering Committee (ESC), DFS, the Legislature, and other stakeholder groups will be essential to achieving a successful implementation as well.

The Strategic Plan for OCM Activities comprises organizational change management activities, approaches, and tools to be deployed prior to selection of an SSI Vendor. The Project Team is aware that there will be a requirement for subsequent iterations of the Strategic Plan to detail OCM efforts which will occur during the Design, Development, and Implementation (DDI) Phase and beyond. As noted in Section 4.3 of the FLAIR[1] Study, it will be necessary to have a comprehensive approach to preparing for and managing the impact of the changes that will occur during transition to the new solution. In order to be prepared for the DDI Phase, the Project Team determined it would be beneficial to have an Strategic Plan for OCM activities to occur *before* the DDI Phase begins.

Purpose

The purpose and intent of the Pre-Software and System Integrator (SSI) Strategic Plan for OCM Activities is to develop a scalable plan to further augment the Project Team's ability to successfully execute OCM efforts prior to selection of an SSI Vendor. This Plan will serve as a guide to the OCM Team, Project Leadership, and other Project Tracks, toward both mitigating change challenges and uncovering opportunities to improve the collective experience of all involved in the Project throughout the   pre-SSI Vendor selection process.

Objectives

The objectives of the Strategic Plan for Pre-SSI OCM Activities include the following:

- To describe the value and guiding principles of OCM;
- To clarify the need for and purpose of OCM throughout the pre-SSI Vendor selection period;
- To identify the relative timeframe(s) over which the Plan will be employed;
- To describe the high-level approach, detailed plan, methodology, and key tools identified and proposed to support the execution of OCM activities; and

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[1] https://www.myfloridacfo.com/floridapalm/wp-content/uploads/2016/06/FS1_140429-DOF05-Final-FLAIR-Study-Combined-v100.pdf

- To describe the benefits of employing the proposed activities, as well as the ramifications of not conducting the proposed activities or achieving the corresponding OCM objectives during the   pre-SSI Vendor selection period.

Background

Florida PALM Project OCM Efforts to Date

The Project's recent and ongoing activities (e.g., project management, business process standardization, agency, and partner collaboration, decision making, risk management, status reporting, research, training, and related activities) contain various change management elements and/or support from the OCM Track. The OCM Team has initiated a Project Collaboration Strategy, developed a Website Content Strategy, and a Pre-DDI Communications Plan[2].

Section 4.3 of the FLAIR Study provided an overview of the Awareness, Desire, Knowledge Ability and Reinforcement (ADKAR) Prosci methodology and documented varied approaches and considerations for managing change and workforce transformation. Additionally, the FLAIR Study focused heavily on OCM work which would be conducted in DDI stages, denoted as "Plan and Assess", "Design", "Develop", "Implement" and "Post-Implementation." However, in preparing the Strategic Plan for Pre-SSI OCM Activities, the OCM Team leveraged a few clarifying questions (provided below) to best focus the Plan on the effort to be conducted *prior to* the DDI Phase:

- What OCM challenges will the Project likely experience during the pre-SSI Vendor selection period?
- What OCM activities will help the Project's efforts be successful throughout the pre-SSI Vendor selection period?
- How will the Project Leadership, Project Team, and impacted stakeholders measure the success of the Project's OCM approach during the pre-SSI Vendor selection period?

It is imperative that the OCM Team continually increase their focus on other change management activities, as denoted in the Strategic Plan, as the Project Team proceeds beyond the release of the Invitation to Negotiate (ITN). Organizational impacts, while potentially different in magnitude and nature than those which will occur in the DDI Phase, will still require attention, mitigation, and support prior to selection of an SSI Vendor.

Relative Timing of Pre-SSI Period

The Florida PALM Project has determined the following dates for key ITN-related procurement milestones:

- Key ITN Release: 11/01/2016
- Vendor Responses Due: 01/24/2016
- ITN Evaluation, Negotiation, and Contract Award: 01/25/2017 – 2/20/2018

The OCM Team has developed and will deploy a Strategic Plan for OCM Activities that is scalable given the potential for adjustments in the overall procurement schedule.

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[2] http://dfsintranet.fldoi.gov/capitol/osp/pmoffice/FCR-PreDDI/OCM/Shared%20Documents/1.0%20Deliverables/OCM01/OCM%201_Pre-DDI%20Communications%20Plan_08152016.docx

The OCM Team is defining, proposing, and preparing for activities which can occur on either a monthly or quarterly basis until an SSI Vendor is selected. By deploying this approach for development and implementation of the Plan, the Project Team can shift focus and reprioritize the emphasis on certain activities, as deemed appropriate.

The Need for Organizational Change Management

Key Transformation Risks

- *According to the Center for Creative Leadership, "66-75% of all public and private change initiatives fail. A resistant organizational culture was the chief culprit the majority of the time."*
- *Large complex technology projects often have a cost of 2-3 times their original budget – primarily due to unanticipated complexities, and the resistance to the change. (Gartner Group).*
- *A Prosci Best Practices Study of over 400 companies noted that when projects had an effective change management program in place, 88% of those projects met or exceeded expectations.*

The data points above provide both answers to and evidence for a fundamental question: "*Why is Organizational Change Management important?"* In organizations that experience transformation failure when planning for and implementing a significant business process and technology change project, a primary driver of that failure is unmitigated organizational risk across the transformation lifecycle, as depicted in the chart below:

Figure1: Key risks in the transformation lifecycle of large process and technology change projects. Source: EY, 2016.
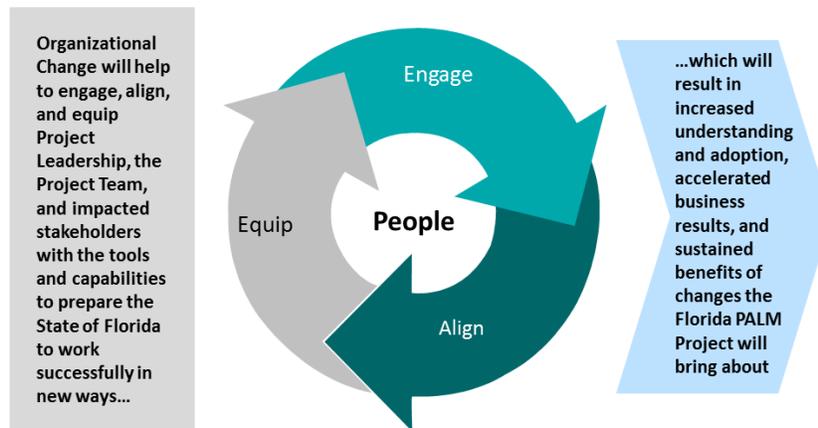

Transformation lifecycle organizational risks

To help overcome these challenges, OCM should be regarded as a "need to have" as opposed to a "nice to have" throughout the entire Project lifecycle to increase the probability of successful outcomes in all Project phases.

The Value of OCM

In summary, OCM is a structured approach for implementing business change so that people understand and embrace the change. By engaging, aligning, and equipping people with the skills, tools, and capabilities needed to successfully adjust behaviors and adopt change, OCM works to maximize Project benefits and to minimize disruption to the organization.

Figure 2: People-related focus for the Florida PALM Project

Organizational Change Will Require Ongoing Focus on the People Component of the Florida PALM Transformation Journey

Organizational Change will help to engage, align, and equip Project Leadership, the Project Team, and impacted stakeholders with the tools and capabilities to prepare the State of Florida to work successfully in new ways...

Engage
Equip
People
Align

...which will result in increased understanding and adoption, accelerated business results, and sustained benefits of changes the Florida PALM Project will bring about

OCM activities prepare people for new ways of working and help build support for sustaining the change in order to realize the desired value the Project is expected to bring. The core of OCM for a major initiative of the size and scope of the Florida PALM Project, particularly during the pre-SSI Vendor selection period, involves addressing business needs, understanding stakeholder support requirements, and countering resistance that may surface as the Project proceeds.

Although there are many different aspects of OCM which the Florida PALM Project will address and mitigate as the project proceeds, the Project Team will likely focus on the following organizational change dimensions (as outlined in red on the chart below) prior to selection of an SSI Vendor:

*Figure 3: OCM focus areas for the Pre-SSI Vendor selection period*
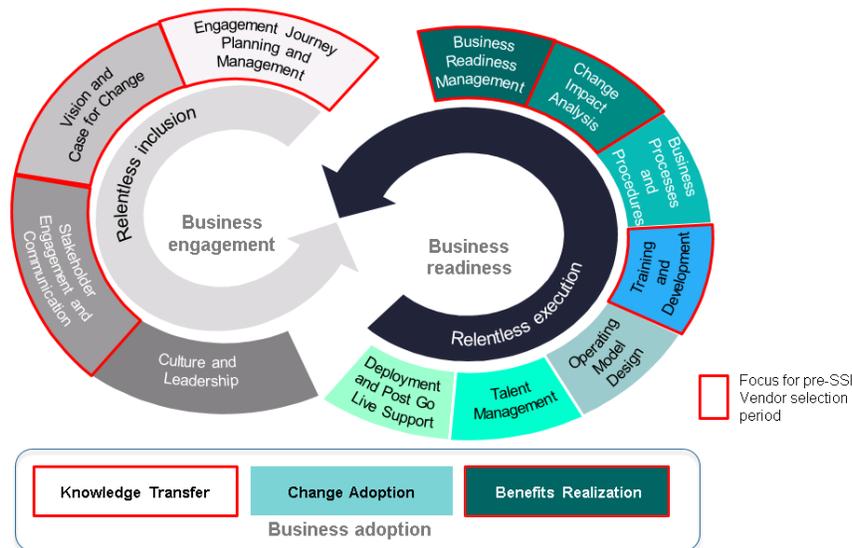
Roles and Responsibilities

In Section 4.3.1.1 of the FLAIR Study, an OCM Functional Model was provided to help characterize interactions between the Project Team, Agencies impacted, and State employees at an aggregate level. For purposes of defining roles and responsibilities for the pre-SSI Vendor selection period, which will have a more narrow emphasis on engagement with all potentially impacted audiences than in the DDI Phase. The OCM Team will work in collaboration with the Project Management Office (PMO), System and Data Strategy (SDS), and Business Process Standardization (BPS) Tracks to drive the development and deployment of OCM activities, seeking counsel from Track Managers, as well as approval of activity and deliverable scope from Project Leadership, the Executive Steering Committee (ESC) and Project Sponsors as appropriate.

Audience

The OCM Team has completed an initial determination of stakeholder groups as part of the audience assessment detailed within the Pre-DDI Communications Plan. The OCM Team has also incorporated elements of the OCM Functional Model provided in Section 4.3.1.1 of the FLAIR Study (below) as part of its initial audience assessment, as the Functional Model reflects the need for ongoing, effective collaboration between members of the Project Team and all parties involved in the Florida PALM journey throughout the life of the Project.

Figure 4: OCM Functional Model (as included in Section 4.3.1.1. of the FLAIR Study)
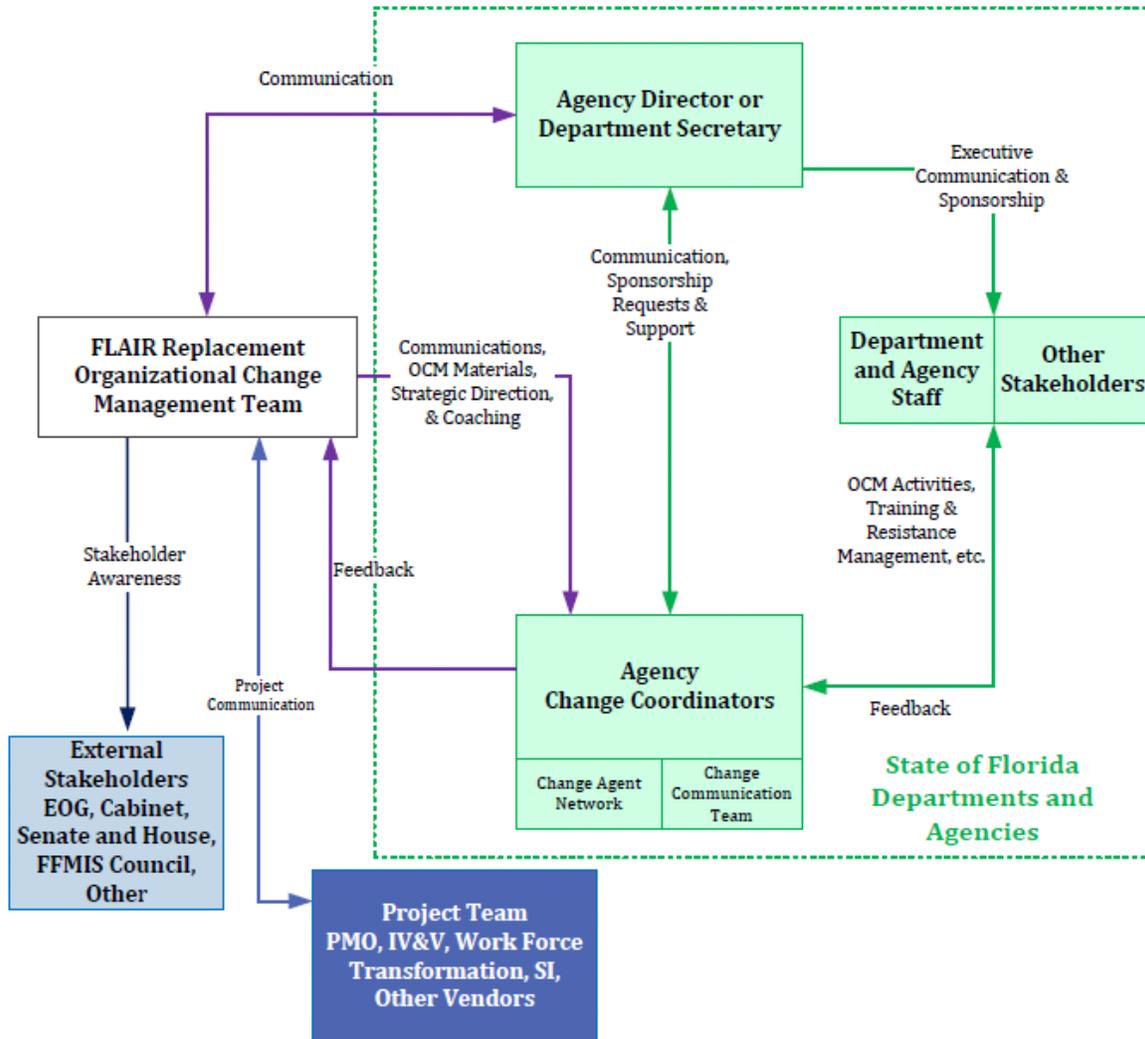
Many activities denoted within the Pre-SSI Strategic Plan will be targeted to stakeholder groups previously detailed in the Pre-DDI Communications Plan and in the FLAIR Study. The primary audience for OCM efforts during the pre-SSI Vendor selection period will include the Project Team, the DFS Office of Information Technology, and both the Accounting and Auditing Division and the Treasury Division within DFS. Other stakeholder groups include the Project Sponsors, the Executive Steering Committee (ESC), representatives of the Legislature, the Agency for State Technology (AST), leaders within other State Agencies, and Agency staff that will be directly involved in or impacted by the Florida PALM Project. Any enhanced or new messaging developed in support of Florida PALM activities will be made available to all State employees, contractors, and constituents as appropriate. (Note: the Pre-DDI Communications Plan states that messages to a broad audience will be reviewed with the DFS Office of Communications, both prior to deployment and where deemed appropriate.)

OCM Scope for Pre-SSI Period

In order to best position the Florida PALM Project Team to respond to common transformation challenges, particularly those that can occur well before an SSI Vendor is selected and the DDI Phase commences, the OCM Team has identified focus areas for inclusion in the Strategic Plan. The scope of these focus areas are inclusive of the change dimensions identified in the aforementioned chart (Figure 3) and have been expanded upon based on Project Team input. The OCM focus areas for the pre-SSI Vendor selection period are denoted below:

- Florida PALM Journey Planning and Management (denoted as Engagement Journey Planning and Management in Figure 3 on page 9)
- Vision and Case for Change
- Stakeholder Analysis and Engagement Planning
- Business Readiness and Resistance Management
- Change Impact Analysis
- Benefits Realization, Change Metrics, and Feedback Mechanisms
- Cross-Track Coordination (to include Project Team Training)

Subsequent content in the Strategic Plan denotes the following for each OCM focus area:

- Objectives
- Benefits
- Methods and Tools
- Proposed Activities for Pre-SSI Period

The OCM Team believes that each of these focus areas will be important to address to help achieve the OCM objectives (noted on page 5). While there may be flexibility in terms of the timing and approach for implementing some change activities proposed, it is worthy to note that organizational readiness risks requiring mitigation prior to the DDI Phase may arise if many of the activities are not deployed. This point is particularly relevant for activities which are intended to assist the Project Team and key stakeholder groups within DFS to be prepared for navigating change as the DDI Phase begins.

Florida PALM Journey Planning and Engagement Management

A concept, which the OCM Team has embraced throughout development of the Pre-SSI Strategic Plan, is the fact that while the implementation will update or replace existing systems, the anticipated complexity and length of the effort will be experienced as a *transformational journey* for virtually all parties involved in and impacted by the Florida PALM Project.

For most large organizations, making significant process and technology changes to improve the business environment involves many challenges, both known and unknown. Without a clear map for what can be considered uncharted territory, project teams commonly have to develop and rely upon journey milestone charts and timelines to help team members, key stakeholders, and involved employees understand what to expect as the organization navigates significant change for months and years to come.

The OCM Team recognizes that creating a long-term visual roadmap for the Florida PALM Project may have been previously deprioritized in order to help manage messaging about the Project and limit the likelihood for inaccurate expectations about key milestone timing as the Team prepared for release of the ITN. However, as the ITN has been released and the Project Team begins the Procurement, the OCM Team believes that preparing a high-level, visual project journey map, initially for use and dissemination within the Project Team, but also accessible to stakeholder groups involved in or impacted by the Project, will be a useful tool to help depict work the Project Team expects to do both in the "near term" (six months) as well as "longer term" (12-15 months and beyond).

To aid in this effort, the OCM Team is seeking to lead by example through preparation of both the overall Pre-SSI Strategic Plan, as well as a detailed activity plan to be developed upon approval of the Strategic Plan. As the OCM Team works with Project Leadership to refine the activity plan, Team resources will also work with the OCM Track Manager and the Project Director to update specific responsibilities by role in an effort to enhance the OCM Team's ability to execute the Plan. Additionally, as Project Leadership prepares to train the Team on expectations for the next significant phase of the Florida PALM journey, the SSI Vendor selection and procurement process, the OCM Team will provide support to that effort.

As the Project Team engages in the Procurement process, there is a common perspective that there will be a substantial period of time between the release of the ITN and the selection of an SSI Vendor. However, the Project Director has noted in previous discussions that it would be beneficial to begin crafting a meaningful "story" about the Florida PALM Project, which will help to maintain momentum about the Project among the various stakeholder groups, especially those whose work will be impacted by use of the new solution. The OCM Team believes there is value in all Project Tracks collaborating on creative approaches for telling the Florida PALM story, developing a longer term Project journey timeline, and engaging select State leadership and State employees in documenting their perspectives on what the Florida PALM Project means to them, how they plan to support it, and what they hope it can achieve.

Florida PALM Journey Planning and Engagement Management for the Project should provide a roadmap which highlights the following:

- Key drivers of change, including the current financial management situation and problem areas the Florida PALM Project is working to address
- Major steps or milestones required to achieve the future state business environment, including changes to processes and technology, as well as the parties involved in or impacted by the Project
- Supporting tasks or efforts relating to each Track, with an emphasis on points of collaboration across the Project Team and with key stakeholder groups

Successful Journey Planning and Engagement Management for the Project should help Project Team members, involved stakeholders, and employees who are impacted by the Florida PALM Project to answer the following questions:

- What are the milestones to be achieved – beginning with the pre-SSI Vendor selection period?
- What key activities will the Project Team be engaged in throughout the pre-SSI period?

- What level of engagement should be expected between the Project Team and specific Agencies and / or stakeholder groups?
- What mechanisms will be in place to determine progress and readiness for the next major phase in the Florida PALM journey?
- What are the measures of success to be achieved along the way (e.g., increased awareness, understanding or commitment, budget approvals, or others)?

While Florida PALM Journey Planning and Engagement Management is important and can be helpful in clarifying and reinforcing the vision for the Project, as well as guiding Team efforts and providing greater sequencing and visibility to broader Team milestones. It is also important to determine what should "not" be reflected on a roadmap, or communicated by State leadership, stakeholders, or other employees, in an effort to help share the Florida PALM story. This is primarily because there may be a need for decisions to be made, or issues to be resolved, prior to communicating on certain topics of interest to all involved. The OCM Team will work with Project Leadership to determine the right level of communication at the appropriate time for any content, or work products, created in support of Project journey planning and related messaging.

Objectives
- Increase the use of visual, relatable tools to convey Team activities, clarify upcoming milestones, and emphasize cross-track dependencies
- Clarify roles and responsibilities to support execution and achievement of Team tasks
- Prepare all Team members for participation in the procurement process and aid the transition from Procurement and SSI Vendor selection to the DDI Phase
- Initiate the capture of thought-provoking ways to tell the Florida PALM story from a Project Team perspective as well as from the vantage point of State leadership and employees

Benefits
- Encourages Team members by providing increased visibility regarding how each individuals' work impacts the efforts of other Tracks
- Improves Team involvement in the procurement process by increasing clarity on what to expect and how to participate most effectively
- Lays the groundwork for evaluating and capturing unique approaches for conveying the Florida PALM journey to other stakeholders
- Enables development of a longer term Project journey timeline, as well as providing the template for messages which State leadership and State employees can use to help share their own perspective on the Project and the improvements they hope the Project will help realize

Methods and Tools
Florida PALM Journey Planning and Engagement Management will involve the use of Project activity planning templates, role / responsibility descriptions, and new or differentiated Responsible, Accountable, Consulted, Informed, and Verified (RACIV) charts, as appropriate. Additionally, the OCM Team will leverage storyboards, timeline/milestone charts, and potentially video scripts. As the OCM Strategic Plan is refined with Project Leadership input, the specific methods, or tools, to be deployed may be updated accordingly.

Proposed Activities for a Pre-SSI Vendor Selection Period

The following is a summary of activities which the OCM Team intends to lead or support to both clarify the path forward for change management efforts and incorporate input from Project Team members, key stakeholders, and other State employees, on challenges and opportunities for improvement that the Florida PALM Project will help bring about.

- **Refine OCM Activity Roadmap and Detailed Pre-DDI Tasks** - The OCM Team will provide an activity roadmap as an immediate next step following approval of the Strategic Plan, clarifying points of collaboration with other Tracks and conferring with Project Leadership on additions or adjustments to planned activities.
- **Clarification of OCM Team Roles and Responsibilities** - The OCM Team will review respective roles and responsibilities to align resources to OCM focus areas, thus enabling greater accountability for specific activities to be supported across the OCM dimensions in scope for the pre SSI Vendor selection period.
- **OCM Support of ITN Training** - Upon completion of the aforementioned activities, the OCM Team will focus on partnering with Project Leadership to assist as needed with planning and deployment of training on Team expectations and requirements for participation in the procurement process.
- **Review of Creative Approaches for Telling the Florida PALM Project Story** - To augment Project Team efforts to communicate more broadly with stakeholder groups, the OCM Team will also review creative approaches for engaging select State leaders and State employees in telling the Florida PALM story.
- **Creation of Project Journey Timeline** - As the ITN process proceeds, the OCM Team will engage working sessions with Track Managers and other Team Members to initiate capture of anticipated high level milestones that comprise the long-term journey for the Florida PALM Project.
- **Documentation of Employees' Perspectives on Change and Project Benefits -** Based on collective efforts to clarify the Project roadmap, the OCM Team will collaborate with the DFS Office of Communications to confirm the approach for capturing content, in written form and/or video, of State leaders and employees expressing their expectations and desires for a successful Florida PALM Project implementation. Once written or video content is developed by the Florida PALM Project Team and reviewed with the DFS Office of Communications prior to deployment, any associated messaging would be made available to all State employees, contractors, and constituents.

Vision and Case for Change

A project's vision is a compelling picture of its the future state. To be effective, a vision should describe a desirable outcome in such a way that is as to be appealing and inspirational to those who will be involved in making it happen. A project's vision should be written in layman's terms, simple and easy to understand, so people can connect on a real and practical level.

A vision statement:

- Provides direction and goals for the Project Team to strive towards
- Describes the desired future state that appeals and inspires impacted parties involved with the Project
- Is usually simple and easy to understand so people can connect on an emotional level
- Helps inform the development of a sound and feasible strategy and plan to deliver

- Should be brief and take less than a minute to communicate

Similarly, a *"case for change"* is a project communication tool that commonly begins by articulating answers to questions employees often have, such as:

- Why are we doing this?
- Why does the State need to transform in this area, and specifically, why is this initiative needed?
- What are the driving factors that have led to the need for the Project at this time?
- What are the benefits that the Project will provide to the State?
- How will the Project directly impact me?

By addressing these common questions and others, the case for change often expands to unveil the value of the project for all stakeholder groups involved. For many organizations planning a multi-year transformation journey, the case for change helps by moving beyond the economic business case for the project and translating the change into practical terms that are meaningful and relevant to impacted people most impacted by the change.

The Florida PALM Project has a vision statement which was approved by the Legislature and has been leveraged in multiple capacities to communicate about the Project to date. However, input from interviews and working sessions conducted in support of the Strategic Plan indicated that a communication tool which exceeds the scope of a frequently asked questions (FAQ) document and packages project messaging in a creative, relatable way would be beneficial to develop in the near term. The OCM Team, in collaboration with the Track Managers and other Project Team members, intends to review and revisit the vision to evaluate whether other supporting messaging can be developed to help personalize communications for stakeholders who have influence on the Project, as well as employees who will be impacted by the changes that Florida PALM will bring about.

A case for change communication tool, which expands upon the project vision and reiterates the direction and intended outcomes for the Florida PALM Project, would primarily serve as a socialization and Project information packet, with the added intention of encouraging and motivating involved and impacted stakeholder groups to continue to support the Project as it moves forward in the months and years to come.

The case for change would also reference, as deemed appropriate by Project Leadership, the following:

- Project scope;
- Short and long-term anticipated benefits; and
- Information specific to certain stakeholder groups or business groups involved, or similarly, *"what's in it for me" (WIFM)* detail that resonates on a personal level.

Objectives
- Align stakeholders on a path forward towards the future State of Florida business environment
- Gain increasing buy-in, acceptance, and commitment for the Florida PALM Project from all impacted stakeholder groups and employees-at-large

- Clarify Project benefits (through WIFM statement development, and case for change development)
- Convey what the future state business environment may look like at a high level once the Project has been implemented
- Reinforce the rationale for why the State has embarked on the Project and why a longer design, development and implementation period timeframe is necessary

Benefits

- Motivates and inspires people to take supportive action on behalf of the Project, even if such action does not necessarily appear to align to their business area (or individual) needs, or conflicts with competing priorities
- Drives the identification of stakeholder group or individual behaviors that need to be reinforced or diminished, in order for the Florida PALM Project vision to be achieved
- Reinforces the Project's ability to communicate a sound and feasible strategy and plan to successfully deliver the Florida PALM solution
- Helps to offset the loss of focus and direction of what the Project is intended to achieve, particularly given the likely length of the procurement and DDI phases

Methods and Tools

The case for change communication tool(s) may take one or more forms, including the use of video(s) hosted via YouTube, an animated motion story, Prezi or PowerPoint presentations, or other formats. (A survey tool, if used to solicit Project Team input for the WIFM statements, would be developed leveraging a tool such as Survey Monkey.) Tools to be leveraged for case for change-related communications will be reviewed and approved by Project Leadership.

Proposed Activities for a Pre-SSI Vendor Selection Period

The following is a synopsis of specific activities the OCM Team proposes to support or facilitate to enhance messaging about the Project Vision to help prepare the Florida PALM case for change:

- **Development of WIFM-Centric Statements** – The OCM Team will hold coffee talks, or similar Team meetings with representatives of all Tracks, to capture Team perspectives on "what's in it for them" (and what they believe the benefits are for other State employees) from implementation of the Florida PALM solution. To augment this effort, an internal Team survey may be used to gain a greater understanding of what each participating Project Team member thinks the Project will bring to the State, and why it is necessary to proceed with the Project at the present time.
- **Project Team Meeting (Review of Talking Points / Elevator Speech)** - The Project scope will be distributed to the Project Team, as it will also be used as an input to the case for change development process.
- **Vision Review Session (incl. "Current State and Ideal State" Comparison)** - In-person working sessions will be facilitated by the OCM Team, with participation from all Project Tracks and Project Sponsors, to review the vision and develop messages which will augment the case for change.
- **Development of a Case for Change Messaging Outline** - Following review of the Project Vision and the development of WIFM statements, the OCM Team will identify messaging which would comprise a case for change. A review cadence will be established to confirm that Project Leadership and all participating Project Team members are in agreement with updates made to the case for change content.

- **Creation of an Updated Project Case for Change with All Tracks** – An initial case for change communication tool(s) will be developed and, once published, will be distributed in alignment with approaches and tactics outlined in the Pre-DDI Communications Plan.

Stakeholder Analysis and Engagement Planning

Stakeholder Analysis and Engagement Planning is the process of identifying the key stakeholder groups that are essential to the success of a major change effort, understanding their needs and expectations, and engaging with them in a way that overcomes potential concerns about change. Stakeholder analysis activities confirm stakeholder groups who may influence the success of the Project, assess their current and future (or ideal) level of involvement with the Project, and help determine the best ways to engage them to increase Project understanding and ensure ongoing support.

As denoted in Section 4.3.1 of the FLAIR Study, key purposes for conducting a Stakeholder Analysis include the following:

- Ensure understanding and inclusion of all impacted stakeholders, which includes anyone impacted by, or with a vested interest in, changes the Project will facilitate
- Serve as the basis for change management, communication, involvement, and as an input into development of specific stakeholder lists for training, communication, and involvement purposes
- Plan for training, deployment, and delivery

Analyzing and understanding stakeholders also aids the Project Team by surfacing answers to common questions:

- Who are the key stakeholders and groups who may influence the success of the Project?
- What is their needed level of involvement with the initiative?
- What level of effort would be required from the Project Team to meet the needs of stakeholder groups identified to date?
- Are there certain stakeholder groups that we believe should be prioritized for the balance of the pre-SSI Vendor selection period?
- How can we best engage with all key stakeholders to build Project understanding and ensure ongoing support?

The OCM Team intends to execute continued stakeholder analysis efforts during the pre-SSI Vendor selection period, including the design and deployment of assessments (surveys) to selected stakeholders and impacted stakeholder groups. The purpose of these assessments will be in part to identify State employee groups that might be somewhat apprehensive about the impact of the Florida PALM Project, as well as those who are supportive of Florida PALM regardless of the implementation period.

Stakeholder Analysis and Engagement Planning activities will be conducted in parallel with Change Impact Analysis and Business Readiness and Resistance Management efforts, both of which are addressed later within this document. The outputs of activities, conducted in both of these OCM focus areas, will be reviewed to determine whether the Project's understanding of the total number and type of stakeholder groups, as well as how the Project Team should support

them. These outputs are expected to be reviewed throughout the pre-SSI Vendor selection period to inform communications planning and other OCM efforts.

Objectives

- Refine understanding of stakeholder groups that will be involved or impacted in the DDI Phase that may need additional information during the Project
- Build support for the change amongst the most critical stakeholder groups that have influence over the success of the Project (including the Project budget)
- Proactively monitor stakeholder engagement throughout the period prior to SSI Vendor selection to continue to encourage commitment and buy-in

Benefits

- Directly improves understanding of stakeholder groups' concerns, needs, and any unique considerations
- Helps encourage an informed, involved, and committed stakeholder community
- Informs communications and other activities so that they will be tailored for impacted groups and individuals in a way that personally resonates
- Significantly limits likelihood that some key stakeholder groups will not fully understand, or be willing to adopt, necessary changes as the Project proceeds beyond the pre-SSI Vendor Selection period

Methods and Tools

To augment the Project's understanding of specific stakeholder groups, as referenced in the Pre-DDI Communications Plan and the Project Collaboration Strategy, the OCM Team understands that it is helpful to map stakeholders (by group). This is to support refinement of engagement approaches, including the deployment of specific messages and how they will align with the overall timing/schedule of the Project's Communication Plan, which assists in determining messaging priorities by audience. It also helps clarify the difference between stakeholder "influence" and "the level of effort" the Project should plan to expend over time to confirm that each stakeholder group's needs are being met, and that the Project is engaging with stakeholders in effective and appropriate ways.

To meet this need, the OCM Team will use a stakeholder engagement planning template to enable a step-by-step approach to analyzing stakeholders, determining their known or anticipated level of support for the Florida PALM solution, and clarifying tactics and team accountabilities for managing engagement with each stakeholder group. The OCM Team will develop a stakeholder survey tool and will leverage the data gathered to help confirm either broad change challenges, or concerns, that will require attention. In addition, the OCM Team will identify any specific concerns of Agency and/or stakeholder groups that may necessitate alternative forms of support.

Figure 5: Key steps in updating understanding of managing engagement with Florida PALM stakeholder groups
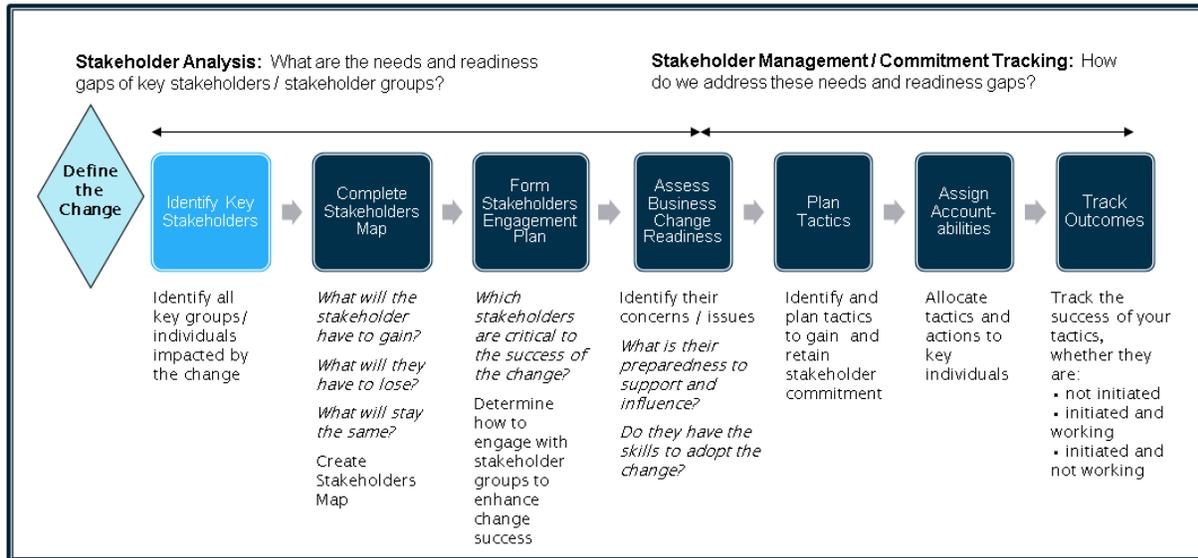
Proposed Activities for a Pre-SSI Vendor Selection Period

While Stakeholder Analysis and Engagement Planning will be executed in tandem with Change Impact Analysis and Business Readiness and Resistance Management activities, other activities the OCM Team will facilitate in support of identified stakeholder groups are listed below.

- **Survey Design Working Sessions** – The OCM Team will lead working sessions with representation from across the Project Team to align on key topics and specific questions which the survey will contain.
- **Stakeholder Survey Development** - The OCM Team will subsequently design an electronic survey, leveraging a tool such as Survey Monkey, as a practical and efficient way to solicit feedback from stakeholder groups across varied geographic locations. (The use of this survey tool will allow for the efficient collection of responses, as well as tracking who has responded to the survey).
- **Individual Agency Stakeholder Management Approaches** - Based on the results of the survey, both broad based and stakeholder group-specific approaches for engaging and addressing concerns will be detailed. (Where appropriate, data from the survey may lead to minor enhancements to the Pre-DDI Communications Plan).
- **Initiation of Project Newsletter (External)** – The OCM Team will prepare stakeholder group-specific content to support launch of a Project PALM newsletter for the external (non-Project) audience. The actual format and distribution of the Newsletter will be determined in collaboration with Project Leadership and the DFS Office of Communications.

As the DDI Phase begins, it is anticipated that the OCM Team will update its approach for engaging with stakeholders to meet differentiated Project needs and stakeholder support requirements at that time.

Business Readiness and Resistance Management

Business Readiness and Resistance Management is about both understanding and anticipating areas in which an organization may be resistant to change, as well as preparing them to address the change in a constructive and effective manner. By assessing both business readiness and potential resistance, the Project Team can gauge how ready stakeholder groups are for the changes that the Project will introduce. This approach is particularly helpful to OCM efforts, as it helps to clarify risks and issues the Project Team will need to address prior to deployment.

Furthermore, Business Readiness and Resistance Management are commonly scalable and flexible in terms of the type of approaches which the Project Team can take, as well as the frequency with which associated activities are deployed.

The OCM Team is aware that it will be beneficial for the entire Florida PALM Project Team to have insights on potential pockets of resistance to change that the Florida PALM solution will bring about. As was noted during working sessions and interviews in preparation for development of the Strategic Plan, several approaches and tools, including deployment of a change champion network, were implemented in support of Project Aspire. However, it was also mentioned that while the State achieved certain successes in terms of agency engagement and involvement during Project Aspire, opportunities to update the approach for tracking business readiness would be beneficial to explore for the Florida PALM Project. This would include the use of change champions as both geographically distributed support resources and on-site collaborators with the Project Team.

During the pre-SSI Vendor selection period, the OCM Team will put specific emphasis on clarifying where, from either a process, a technology or an organizational perspective, resistance to change to the new solution must be proactively addressed prior to initiation of the DDI Phase. Through the deployment of agency surveys, the establishment of a common two-way communication mechanism, in parallel with implementing an updated change champion network strategy approach, the OCM Team will continue to collaborate with Project Leadership and the BPS and SDS Tracks to confirm that both organizational readiness and potential resistance are effectively planned for and managed through the balance of the pre-SSI Vendor selection period.

Objectives
- Gauge preparedness for change among involved stakeholder groups
- Uncover otherwise unknown issues and challenges prior to design, development, and implementation of the Florida PALM solution
- Prepare State Agencies for a successful change process with the assistance of key local leaders or "champions"

Benefits
- Informs the Risks, Actions, Issues, Decisions, and Lessons Learned (RAIDL) process by providing a direct means of gathering actionable OCM input to support project risk and issue management
- Determines the "temperature" for change among varied stakeholder groups and surface areas that may need mitigation prior to SSI Vendor selection
- Provides a connection between Agency change leaders and other stakeholders so that all parties feel more involved, informed, and heard

- Enables sharing of accountability for Project success between the Project Team and select stakeholders so that change can be embraced by the business (and not solely driven by the Florida PALM Project)

Methods and Tools

Business Readiness and Resistance Management will be facilitated by reviewing the results of agency surveys, which will be developed by the OCM Team via Survey Monkey, or a comparable tool, in collaboration with Project Leadership, as noted in the Stakeholder Analysis and Engagement Planning section of the Strategic Plan.

Figure 6: Sample template for mapping survey results for an agency / stakeholder group to business readiness indicators

Mapping of Key Results (By Assessment Category)

Florida PALM Business Readiness Survey Results Chart
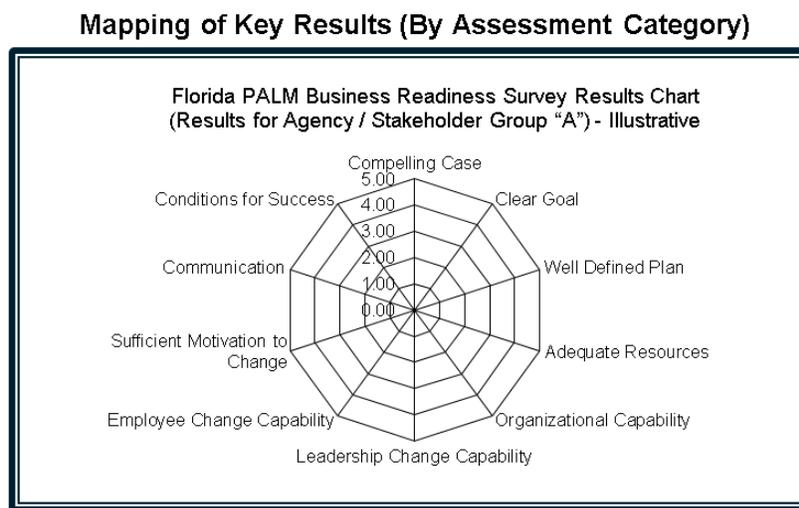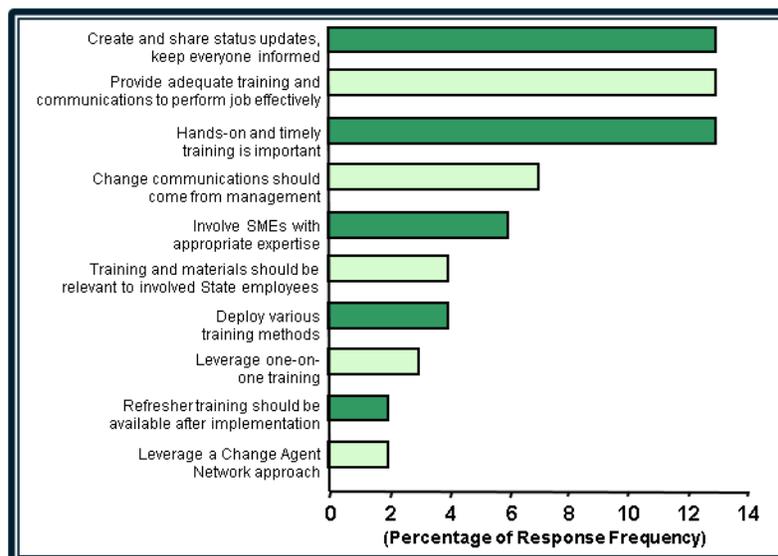(Results for Agency / Stakeholder Group "A") - Illustrative

Figure 7: Illustrative summary of results from survey deployed to assess business readiness

Open Ended Question Results Summary (By Key Theme)

The OCM Team will also leverage either a Florida PALM SharePoint blog, or another Project Support Tool (PST), to enable real-time collaboration with representatives of varied stakeholder groups. Change champions will also be reengaged with a new strategy and supporting tools, such as revised change champion role descriptions, status reporting tools, and Florida PALM update communication packets for dissemination within their respective Agency. As the OCM Strategic Plan is further refined with Project Leadership feedback, certain methods or tools may be updated where deemed appropriate.

Proposed Activities for a Pre-SSI Vendor Selection Period

The following is a summary of activities which the OCM Team intends to lead or support to both clarify the path forward for change management efforts and incorporate input from Project Team members, key stakeholders, and other State employees on challenges and opportunities for improvement that the Florida PALM Project will help bring about.

- **Deployment of Agency Temperature Surveys and Results Summaries** – A survey tool will be developed incorporating the questions that can be reused at various milestones (e.g. quarterly) during the pre-SSI Vendor selection period, but at a minimum, the OCM Team will plan to deploy a survey at least two times prior to onboarding of an SSI Vendor. Specific stakeholder groups targeted for the survey will be updated in partnership with Project Leadership, and communications in support of dissemination of the survey tool will be reviewed with the DFS Office of Communications. Questions developed for the survey will allow participants to provide a range of responses from "Strongly Agree" to "Strongly Disagree" based on 8-10 categories commonly used to assess business readiness. The OCM Team will revisit the assessment categories periodically to confirm whether changes have occurred in data from specific Agencies or stakeholder groups, or at an aggregate level, and the OCM Team will collaborate with each Track to determine and deploy efforts to help address potential issues (via communication or engagement activities as identified throughout the Strategic Plan). Agency profiles, which were previously created as part of Project Aspire, will be updated through OCM Team efforts.

- **Development and Kickoff of Interactive Communication Medium** – The OCM Team will evaluate the use of a SharePoint blog to facilitate two-way communication between the Project Team and among representatives of varied involved stakeholder groups. The Project Team will leverage the approach for monitoring the Project's email inbox, and guidance for timing of responses prior to deployment, and the OCM Team may also create new content for the Project Management Plan communication standards to specifically address use of the proposed blog prior to deployment. In addition to, or in place of, a blog, the OCM Team will partner with Project Leadership to confirm alternative means of enabling ongoing two-way dialogue and continued responsiveness to questions, such as a project hotline, with acknowledgement that the use of a hotline may be implemented prior to SSI Vendor selection, but may be increasingly relevant as a Project Team tool during the DDI Phase.

- **Development of a Change Champion Strategy** – Shortly before the selection of an SSI Vendor and the beginning of the DDI Phase, the OCM Team will initiate planning efforts to support the launch of a Change Champion Network for the Florida PALM Project. These planning efforts will include updates to change champion roles and responsibilities and the identification of potential champions.
    - This approach will enable the Project to both achieve and maintain early project commitment and adoption from key business representatives who can act as project liaisons, field questions and solicit input. Importantly, change champions

will work "hands on" to support their Agencies and other involved stakeholder groups with readiness efforts.

   o Additionally, early change network planning should foster buy-in and commitment, which can increase project success by helping impacted individuals to know that their needs are being addressed and their concerns are being represented and mitigated.

- **Engagement of Change Champions** – The network will be comprised of State resources from stakeholder groups involved and will help represent the Project and champion the Florida PALM solution at local agency or stakeholder group levels. Florida PALM change champions will be charged with promoting awareness, demonstrating understanding and acceptance, and serving as a channel for ongoing feedback between employees involved or impacted and the Project Team. As needed, the OCM Team may conduct meetings or working sessions with change champions at various points in time during the DDI Phase. Status reports or network dashboards will be prepared by the OCM Team based on input from change champions.

   o Both change champions and their respective Agency leaders may be interviewed to further assess change readiness, explore clarifying questions in support of next steps, and address feedback gathered to date.

Change Impact Analysis

Similar to other focus areas detailed in the Strategic Plan, Change Impact Analysis will be executed as a scalable approach for identifying the levels, types, and magnitude of change that the Florida PALM Project will bring to the State. Change impact analysis activities during the pre-SSI Vendor selection period will provide an understanding of how the Project will impact key Agencies involved and other State stakeholder groups from a process, technology, and people perspective during the DDI Phase and beyond. Analysis efforts augment other OCM activities and further inform Project Leadership on type of resources and level of effort required to manage and deliver changes to the State's solution. The following chart provides an illustration of how Change Impact Analysis efforts will enhance the Project Team's efforts to update messaging, maintain stakeholder engagement, and identify key actions which State leaders should take to continue to position the Project for a successful DDI Phase.

Figure 8: Change impact analysis process steps, resulting in ideal "future state ways of working" among other key outputs
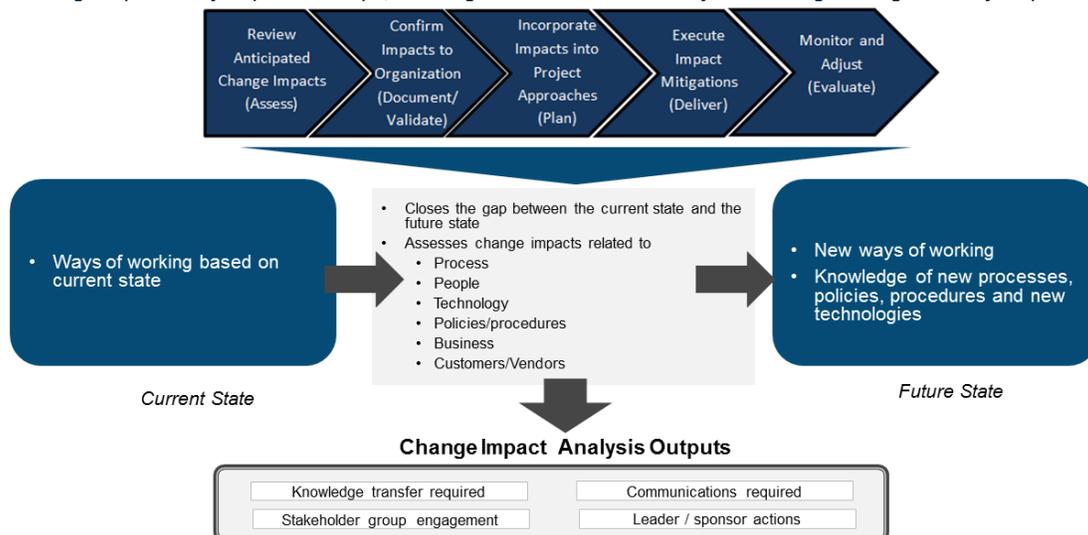
A variety of questions will be addressed through change impact determination efforts for the Florida PALM Project, which include, but are not limited to, the following:

- What are the anticipated changes to day-to-day operations (e.g., processes, systems and technology, and regulatory requirements) that the Project will help initiate during the DDI Phase?
- Based on a "point in time" understanding of skills and knowledge among stakeholder groups involved, what new skills will be required of employees as the Florida PALM Project proceeds? (current and required)
- Similarly, based on current job roles and responsibilities, what new or emerging roles and responsibilities will need to be addressed by the Project and stakeholder groups involved?
- What are examples of specific work behaviors leading to effectiveness and efficiency in financial management which should be retained and reinforced – and what behaviors would be more ideal in the future state business environment?
- What needs or expectations do vendors, customers, and citizens have at the present time – and how will these expectations change over time as the Florida PALM Project proceeds to the next DDI Phase and beyond?

Objectives
- Systematically assess, in collaboration with other Project Tracks, the anticipated impacts to business processes and technology
- Outline how Project-related changes will impact each Agency and the entire State organization
- Determine what each stakeholder group will require in terms of support to overcome anticipated changes (e.g., training, communications, etc.)
- Consolidate and update information on each Agency to gain a deeper understanding of issue or risk areas requiring mitigation and monitoring

Benefits
- Increases understanding across the Project Team of how each Agency will need to address change
- Provides detailed input into the Communications Strategy and Plan, Change Champion Network Strategy, and eventually the Training Strategy and Plan (during the DDI Phase)
- Improves knowledge among Agency leadership and other State leaders of how Florida PALM-related change specifically impacts them, and what changes will be made organizationally where relevant
- Equips change champions to develop more customized and effective change strategies
- Directly informs Project Leadership on how best to prioritize resolution of change impacts, and where to invest resources to provide support where they are most needed
- Avoids the potential for underestimating the magnitude of change that the Project could bring about, as well as what level of effort will be needed to sufficiently transition impacted business groups to the desired future state

Methods and Tools
The OCM Team will leverage and update as needed, the Agency Profile templates used for Project Aspire. The Team will also update a common interview template for use in interviewing select Agency leaders and other Agency resources. BPS Level 2 training will also be conducted

with Project Team members to help clarify understanding of likely impacts to stakeholder groups and increase familiarity with the proposed Florida PALM solution.

Proposed Activities for a Pre-SSI Vendor Selection Period

The OCM Team has identified the following change impact analysis activities and related work products:

- **Agency Profiles -** To help facilitate execution of change impact analysis activities, the OCM Team will review and revise the Agency Profiles by adding new or differentiated data fields as deemed appropriate.
- **BPS Level 2 Training and Review of SDS Documentation -** The Project Team will participate in Level 2 BPS Training, developed by the BPS Team in collaboration with the OCM Team, to review the business process models and resurface known and potential impacts to State employees. The OCM Team, in collaboration with other Tracks, will also review the SDS Data Management Plan, the Enterprise Application Strategy, and other deliverables to further clarify understanding of change impacts.
- **Agency Interviews -** The OCM Team will also leverage interview templates, modified for the Florida PALM Project, to conduct one-on-one interviews, or small workgroup discussions. (Based on a review of the resulting interview data, the OCM Team may assign "high, medium, or low" ratings to reflect the anticipated magnitude of each impact identified, which will be augmented by a legend describing the rationale for the ratings assigned.)
- **Discussion of Anticipated Change Impacts –** The OCM Team will facilitate one or more Project Team meetings to review and confirm anticipated change impacts captured from the interviews and from review of Project documentation to date. As needed the OCM Team will collaborate with the PMO Track to document findings in RAIDL.

Benefits Realization, Change Metrics, and Feedback Mechanisms

Implementation of a new solution is believed to be viewed by many as a beneficial and necessary change for the State. The Project Team is aware that it will be necessary establish and monitor metrics aligned to change adoption goals and other benefits to help determine whether the Project is on track to achieve implementation success. Coupled with the need to leverage creative means where possible for capturing ongoing feedback from those involved and / or impacted directly by the Project, the OCM Team will incorporate several methods and tools to measure progress in mitigating change risks and encouraging support for, and acceptance of, the Florida PALM solution.

The OCM Team will have a benefits realization approach for capturing change metrics data and feedback from Project Team members and key stakeholders. The purpose of having a benefits realization approach is to provide a mechanism for realizing benefits through managing change risks, driving the case for change, and further enabling organizational readiness and commitment for the Florida PALM solution.

A comprehensive approach to monitoring change metrics and collecting change readiness related input from the Project Team and key stakeholders will answer the following questions:

- How can we best continue to drive the case for change among all stakeholder groups involved?
- What are the most ideal areas to be monitored and measured in order to gather understanding, awareness, and change acceptance data?
- When will change metric data gathering and stakeholder feedback be the most relevant to gather during the period prior to SSI Vendor selection?

Objectives

- Establish metrics that link to Florida PALM Project benefits, scope, future state vision, and the case for change
- Provide a clear line of sight into how the Project is tracking relative to the business value it is intended to realize
- Provide another viable, recurring mechanism for identifying areas of risk to mitigate
- Expose challenges with change acceptance that may require adjustments to confirm that a meaningful return on investment for the Florida PALM Project can be achieved
- Deliver inputs to other OCM activities and augment OCM Team and Project Management understanding of resources required to address change challenges
- Provide a baseline to measure success and set expectations
- Initiate long-term plans for the transfer of ownership of change metrics tracking and benefits realization from the Project Team to State leaders from Agencies involved

Benefits

- Provides the ability for the Project to track and monitor achievement of organizational preparedness-related benefits, as well as change awareness and acceptance goals
- Determines whether the planned process and technology improvements and changes are likely to be adopted, and if not, enables refinement of corrective measures to be put in place
- Confirms that feedback is captured from Project Team members and key stakeholders in innovative ways within the pre-SSI Vendor selection period and throughout the Project lifecycle
- Clearly defines change metrics, which will allow the Project Team to identify whether the Project is on track to achieve its stated benefits and sustain change

Methods and Tools

During the period prior to SSI Vendor selection, the OCM Team will encourage the initiation of Project Team monthly emails, which will provide Project updates and provide a means for sharing varied Project Leadership and Team member perspectives. The OCM Team will also conduct working sessions, or workgroups, to facilitate collaboration with Project Leadership on the confirmation of metrics to enable tracking of Florida PALM awareness, understanding, and acceptance goals, and leveraging previously identified metrics which have been deployed on other multi-year transformation efforts. These proposed metrics will also be shared with the Project Sponsors for review and feedback.

The OCM Team anticipates tracking, at a minimum, two change metrics among stakeholder groups and / or targeted communication audiences as the pre-SSI Vendor selection period proceeds. This includes:

- "ratings" and related feedback provided on the relevance of (and perceived benefits of) communications received recently or to date; and
- how, and in what capacity, message recipients are formally responding to Florida PALM communications and other types of interactions with the Project. This latter metric is monitored via the Project's Collaboration Strategy; however, to augment this data, the OCM Team will assess and categorize the types of feedback received to help determine whether communications are meeting the intended goal, or whether reinforcement of messaging is required.

The OCM Team will also leverage the results of change impact identification efforts as inputs to working sessions with Project Team members and select stakeholders in order to confirm specific plans for addressing change risks. During working sessions or workgroups, the OCM Team will plan to leverage real-time, fast-paced collaboration tools which lead to prompt data gathering and encourage alignment among all participants on key outputs. These tools may include ThinkTank and/or Poll Everywhere as denoted in Figure 9.\

Figure 9: Collaboration tools to accelerate feedback gathering and alignment during working session or work group results. Use of ThinkTank or Poll Everywhere will be subject to Project Leadership approval of any associated costs.
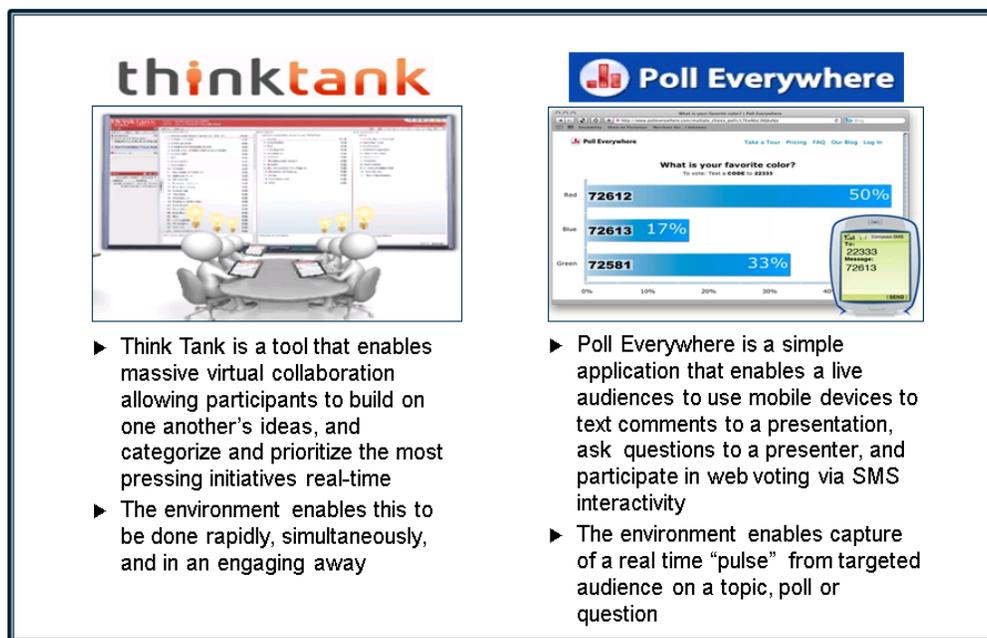
Proposed Activities for a Pre-SSI Vendor Selection Period

The following is a synopsis of specific activities which the OCM Team proposes to support or facilitate to augment Project Team and key stakeholder feedback gathering, as well as change metric identification and tracking:

- **Project Team Update Emails -** The update emails, which will be deployed once a month or as appropriate per discussion with Project Leadership, will serve the purpose of both gathering input from the Project Team as well as disseminating feedback related to observations of change risks requiring attention or opportunities to improve change metric results, among other topics. The OCM Team will work with Project Team members, and select stakeholders as appropriate, to confirm that content for the emails is timely and

relevant, and that it augments other efforts to maintain ongoing dialogue across the Project Tracks.

- **Determination of Project Awareness Baseline and Future Targets -** The OCM Team will collaborate with Project Leadership to confirm ideal levels of awareness, understanding and change acceptance among target audiences for Project communications and other OCM activities, as well as near future targets which the Project would like to attain through OCM efforts. These targets will be measured by questions incorporated within the survey design completed as part of the OCM Team's Stakeholder Analysis and Engagement activities as denoted earlier in this document.
- **Collaboration with All Tracks on Confirmation of Success Measures -** The OCM Team will also work with Project Leadership and each Project Track to identify a list of indicators of project success. These success measures will initially be focused on the balance of the pre-SSI Vendor selection period but may be updated prior to the start of the DDI Phase.
- **Change Impacts Working Session(s) –** As a follow up to discussions to confirm anticipated change impacts (as denoted in the proposed Change Impact Analysis activities for the pre-SSI Vendor selection period earlier in this document), the OCM Team will facilitate one or more Project Team meetings to determine, or validate, proposed mitigations to address these potential impacts. These meetings will also be informed by the results of recent change metric data, as the Project Team will leverage these sessions to focus on actions which address areas of greatest risk and greatest opportunity to improve change metric results (i.e., if the Team has limited bandwidth or resource availability to address all possible risks and opportunities identified through Change Impact Analysis efforts).

Cross-Track Coordination and Knowledge Transfer

A Cross-Track Coordination and Knowledge Transfer approach will help further clarify what types of knowledge would be most beneficial to transfer from one Project Track to another, or from Project Leadership to other Project resources. This approach will enable the broader Team to be as prepared as possible to support the Project as the pre-SSI Vendor selection period continues. From an OCM perspective, this also helps to confirm that the OCM Track is working effectively and collaboratively with the rest of the Project Tracks.

Additionally, a Cross-Track Coordination approach can help reinforce skills needed for Project management and other Project resources so that the Team will be well positioned to continuously improve its capabilities and "ways of working" well after an SSI Vendor is selected.

An effective approach to collaborating across Project Tracks, to increase the type and amount of knowledge transfer and sharing that occurs, will address the following potential concerns:

- How can we best position all Project Tracks to maintain mindfulness around cross-track knowledge sharing as an important output of ongoing work efforts?
- How can we help embed a greater focus on cross-track coordination so that the Project Team increases its ability to navigate the Florida PALM Project journey – particularly in advance of onboarding of the SSI Vendor?
- What are examples cross-track activities we can execute which will not only increase collaboration and understanding across the Team, but will also help "model" the types of

activities the Team will need to engage in when the change champion network is re-formed and the involvement with impacted stakeholders increases?

Objectives

- Confirm that all Project Tracks are as informed as possible to lead the Florida PALM transformation journey
- Provide a platform for leveraging Team thoughts and perspectives to revise talking points and develop elevator speeches
- Assist Project Team resources with communicating with stakeholders outside the Team in ways that will resonate with them personally and keep messaging about the Project on one common accord
- Continue to promote a Team culture in which each individual finds satisfaction in their work efforts
- Facilitate ongoing knowledge transfer and collaboration across all Project Tracks

Benefits

- All involved will better understand and execute their role in creating an effective change process for Florida PALM
- Increased knowledge sharing can help bring Project activities to completion more efficiently given greater cross-track understanding of dependencies
- The broader stakeholder community will be engaged and communicated with more effectively by all Project Team resources

Methods and Tools

The following chart provides a synopsis of methods and tools that other projects have leveraged (and which the OCM Team has taken into consideration) to develop and incorporate a creative Cross-Track Collaboration approach. The chart below is also inclusive of ideas which the OCM Team may revisit both as the pre-SSI Vendor selection period continues as well as prior to the start of the DDI Phase.

Figure 10: Methods and tools for encouraging Cross-Track Collaboration

Build a sense of adventure: make it an adventure that people want to be part of
▶ Develop a galvanising and overarching vision
▶ All adventures are a journey. Draw parallels of the program journey to people's everyday experiences and replay progress along the way

Get personal: create something people can relate to
▶ Understand a day in the life (DILO) of those you collaborate with to encourage more meaningful interactions and cross-track understanding
▶ Develop impactful themes/stories to thread through all engagement – which can also augment efforts to "tell the Florida PALM Project" story with the broader DFS organization and impacted stakeholder community
▶ Continue to encourage recognition of individual involvement and track achievements – particularly when those efforts help to further the Project's change plan

Ditch dull: go beyond the norm
▶ Use creative themes, communications and approaches to include:
  ▶ Brown Bags, Coffee Talks, and other means of conducting cross-track knowledge sharing (including thoughts on FAQ responses, Project talking points, etc.) and lessons learned discussions
  ▶ A connection web figure which shows how each Track touches varied Project deliverables and initiatives led by varied Tracks, as well as what each Track does
  ▶ Posters to describe Track focus areas and responsibilities
  ▶ Posted Florida PALM themed "memes", laminated cards with key talking points, and paraphernalia for Team member/key stakeholder's desks
▶ Capture cross-track working session outputs creatively

Proposed Activities for a Pre-SSI Vendor Selection Period

As denoted in Figure 10 (above), the OCM Team has considered various means of encouraging and reinforcing cross-track collaboration throughout the balance of the pre-SSI Vendor selection period. However, the following are specific activities which the OCM Team proposes that the Project Team conduct in the near term:

- **OCM Knowledge Transfer Session(s) with Other Tracks –** The OCM Track will lead sessions to review key elements of the Strategic Plan for Pre-SSI OCM Activities. During the sessions, the OCM Team will also provide perspectives on areas in which other Tracks can directly support, or otherwise augment, OCM efforts throughout the pre-SSI Vendor selection period – as well as receiving feedback on opportunities to refine plans where appropriate.
- **BPS Knowledge Transfer Sessions(s) with Other Tracks –** The OCM Team intends to solicit support from the BPS Track to conduct knowledge transfer session(s) that will provide further insight on BPS efforts to date, as well as near term workstream efforts to occur as the pre-SSI Vendor selection period proceeds.
- **Coffee Talks (Gathering of Team Talking Points / Elevator Speech Input) –** In connection with the development of "WIFM"-centric statements, as noted in the Vision and Case for Change section of this document, the OCM Team will collaborate with other

Tracks to update Florida PALM talking points, as well as developing elevator speech content which can be leveraged in Project Team member interactions with those outside of the Team.

- **Stakeholder Identification Workgroups –** The OCM Team will conduct workgroups with varied Track members to refine the list of individual stakeholders and stakeholder groups which should be in scope for Florida PALM stakeholder engagement activities.

Next Steps

As previously noted, the OCM Team will prepare a detailed, tactical plan coupled with a RACIV illustrating roles and responsibilities for approving, supporting, and deploying selected OCM Activities. This tactical plan has been initiated, but it will be refined and completed upon approval of the Strategic Plan for OCM Services. Activities in the tactical plan will cover the period prior to selection of an SSI Vendor, and will include tasks regarding updating the Strategic Plan prior to the beginning of the DDI Phase.