

Create an organizational change management (OCM) plan

Frequently asked questions

Definition

Is there more to OCM than training and communication?

The purpose of OCM is to support an organization through a change. This change can be in work processes, expected behaviors, decision-making processes, etc. Training and communication are core components of an OCM program. It is better to think of the scope of OCM more broadly to cover a multitude of activities throughout the lifecycle of your ServiceNow journey. These can include a transitional roadmap, stakeholder analysis, sponsorship guidance, training and enablement plan, communications plan, impact analysis, champion enablement plan, governance and center of excellence design, and much more.

Process/implementation

How do I get executive buy-in for OCM?

Executives realize that OCM is important and are usually supportive of the change—at least, that's what they often say. But the challenge is to assess their level of commitment to OCM activity. There are markers that measure their commitment level, simple things, such as their attendance at key meetings, responsiveness in decision-making, and willingness to step in and be the champion of changes.

If there are indications that executives need to do more, use data from stakeholder analysis and other sources, even if it's anecdotal, to show how important OCM activities are for the success of the project. Use information from outside experts like implementation partners or ServiceNow's Success Architects to help make the case. Sometimes, executives need specifics on what you need so they can show their support, like attend key meetings or send an email from their personal account. They may already think they're doing everything you need them to.

We run small projects with short durations. How does OCM apply to my project?

Consider taking an MVP approach to OCM. Understand that one of the purposes of OCM is to use communications and training to help manage the people side of the change. This starts with a solid understanding of stakeholders' needs and what they'll require to adopt to the change. Some of the considerations that can inform your OCM approach is type of change in each project, for example, you may be able to group a few projects together for a bigger communications effort.

Align your OCM activity cadence with major changes that impact your stakeholders. For example, if a project is mostly about back-end systems work, you may not need a big emphasis on communication or training. Deliver a clear message about the need for the change, in other words explain the "why" behind the project, and "what's in it for me/us" to articulate the benefits of this change at the individual level.

Who should be the target audience for my OCM plans?

Think of segmenting your audience by their needs and expectations of the change. For example, your executives may have different needs than the teams whose way of working will change. For the teams you might plan detailed training sessions to walk through the new process and system, while the communications with your executives will focus on a summary of the changes and how well the teams have accepted them.

We just went live with a major implementation. How should I think about OCM?

In the run mode, OCM might take on different formats and levels of effort. One thing you can do right away is a retrospective of the project you just finished to document any lessons learned from an OCM perspective. Were there any surprises during the rollout? Was there a specific stakeholder group that was a surprising supporter or resistor? Ask any questions in your retrospective that will help you learn what you can do better in the next major launch.

This doesn't mean you can shelf your OCM efforts until the next launch. Continue communicating with stakeholders about ServiceNow enhancements that are helpful to them and keep them informed of the ongoing value you're getting from the Now Platform®. Also use this downtime to build a [community of champions](#) who can be the ambassadors for platform use. Since ongoing releases include so much new functionality in the platform twice a year, there are always new benefits and enhancements to talk about. This gives you a great opportunity to work with your platform team and [Center of Excellence](#) to design a communication and education model that engages your audience for the long term.

We don't have the budget or resources to engage a dedicated OCM resource. How can we make sure we still achieve user adoption outcomes?

If you're undertaking a major initiative with a large impact like launching an employee portal, ask your executive sponsor to provide OCM resources. The success of your initiative is largely dependent on user adoption so you may need to reduce your scope in other parts of the initiative.

You can also look for opportunities to use the resources you already have to take an MVP approach. Conduct a stakeholder analysis to understand the highest impact areas for OCM efforts and how to get them ready for the change. For example, if you have a weekly communication cadence to the target stakeholders, find out if you can get a blurb about your project included in that email. The project manager can draft up the blurb using information from weekly status updates. Communication is the foundational aspect of OCM, and you don't need a lot of extra resources to do the bare minimum.

Do you have any tips on conducting a stakeholder analysis?

ServiceNow's implementation methodology, [Now Create](#), has a format for stakeholder analysis. You probably want to break down your audience into end users, process users, technical users, business stakeholders, and executives and think about what messaging each group requires. You can gather information in informal methods like one-on-one meetings or team meetings to understand the messaging and training needs. Identify any "friendlies" in the stakeholder group to get an honest assessment on hidden blockers. Use a mix of formal and informal tactics to understand different stakeholder needs, fears, and objections to the change.

Related resources

How can ServiceNow help?

Start by watching our [short overview video](#) to get smart fast (the description includes links to additional resources). In addition to our [OCM planning resources](#) on the Customer Success Center, ServiceNow's Customer Outcomes group helps customers design and implement their approach to OCM. Contact your account executive for more information.