AHCA Florida Health Care Connections (FX)

Strategic Enterprise Advisory Services (SEAS)

FX OCM Tools Playbook

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Revision History

DATE	VERSION	DESCRIPTION	AUTHOR
05/16/29	001	FX OCM Tools Playbook Development Draft Version	Meg E. Infiorati

Modifications to the approved baseline version (100) of this artifact must be made in accordance with the Change Control process that is part of the Scope Management Plan.

Quality Review History

DATE	REVIEWER	COMMENTS
5/14	Carol Williams	Conducted QC review.

Table of Contents

Table of Exhibits

SECTION 1   INTRODUCTION

This tool access and usage guide helps users by directing them to all tools utilized by Organizational Change Management (OCM) Services, the Team Lead, and the FX Project OCM Representative. This document includes a link to the master tools folders. Within each tool folder, OCM Services has included a full set of instructions on how to use and complete each specific tool.

To access these tool folders (identified in **Exhibit 1-3: Abbreviation of Each Tool and Description**) listing each tool by abbreviation, full tool name, and its description, the user can click the link to the overall OCM folders (noted below), or follow the step-by-step directions under the link. The user will download the tool the first time from the master folder and begin or complete the tool. When ready, the user will save that version of the document to the appropriate OCM project folder with the proper file name (see Section: Managing Versions). All OCM related project folders for a given FX project will be created by OCM Services at the time the contract is signed and approved.

Two graphics are included in this document for the user's information.

The first graphic, **Exhibit 1-1: Change Tools and CMS XLC** (which refers to the Centers for Medicare and Medicaid Services eXpedited Life Cycle), outlines each tool name and the project phase in which it is typically started. The second graphic, **Exhibit 1-2: Tool Interaction Chart**, notes which tools have data that feed other tools or that are fed by other tools.

1.1 TOOL USAGE GRAPHICS

Exhibit 1-1: Change Tools and CMS XLC

OCM TOOL TABLE		
INPUTS	**REQUIRED TOOL**	**SUPPLIES INFORMATION FOR**
Stakeholder Engagement Plan	Change Strategy	Impact Index Sponsor Roadmap
Stakeholder Analysis Business Readiness Assessment Change Readiness Assessment Case for Change	Communications Approach Toolkit	Communications Plan, Sponsor Roadmap
Communications Approach Change Strategy Stakeholder Analysis	Communications Plan	Communications Toolkit Design Sponsor Roadmap Change Network Approach (also receives information from Sponsorship Roadmap)
	Change Readiness Assessment	All
Impact Index Change Network Approach Stakeholder Analysis	Training Approach and Plan	Training Curriculum (as defined by project) Sponsor Roadmap
	Change Sustainability Approach	All
	Continuous Improvement Plan	All

Exhibit 1-2: Tool Interaction Chart

1.2 TOOL LOCATIONS

This section includes the steps to locating tools. When reviewing tools, they may be formatted in one of three software applications that will be required to be installed on your device. The software platforms for the tools are: Microsoft® Word, Microsoft® Excel, and Microsoft® PowerPoint. Within each tool you will find instructions on how to use each tool as well as a *blank* copy/template of the tool for completion.

To access OCM tools, follow the link below to reach the master folder of all tools located in the FX Projects Repository:

https://flahca.sharepoint.com/sites/mes/SEAS/Shared%20Documents/Forms/Default.aspx?RootFolder=%2Fsites%2Fmes%2FSEAS%2FShared%20Documents%2FSEAS%20PMO%2FTemplates%2FOCM%20Services%20Tools%2FOCM%20Tool%20Guides&View=%7B498DADA7-106E-4E5D-A567-40B67467DC82%7D

Alternatively, you can use these step-by-step navigation instructions below to reach each individual tool folder. The tools are on the FX Projects Repository under the SEAS tab on the home page.

1. Navigate to the SEAS Organization on the left side list and click.
2. Under Quick Links in the first column, look for Project Templates and click.
3. Look for the OCM Services Tools folder and click.
4. Look for the OCM Tool Guides folder and click to access the individual tools according to the three-character label for each tool which are found in **Exhibit 3-1: Abbreviation of Each Tool and Description**.

1.3 MANAGING VERSIONS

Each project will have its own file to store all of the partial or completed tools as they are utilized across the project lifecycle. As it is likely that a tool will be opened and updated numerous times along the project's life cycle, it is recommended that each time the tool is updated, it is updated with the project name (e.g., IS/IP), two or three-letter tool abbreviation (e.g., CN, BRA, etc.), and next version number (e.g., 001, 002, etc.); each part of the label will be separated by hyphens (-). This will help to ensure that the project includes a recorded history of all changes (e.g., if a prior version had key dates or comments, it can be reviewed as to what and when changes occurred).

Example: The initial and subsequent versions of the Integration Services and Integration Platform (IS/IP) Business Readiness Assessment can be saved as follows:

- ISIP-BRA-001
- ISIP-BRA-002, etc.

To achieve this, when you update a document, please follow these steps below:

1. Move the current document to the historical file.
2. Download that copy to your device.
3. Make your updates and save locally (in the event you accidentally overwrite a file).
4. Upload and save as described in the labeling approach above. (Your name and the date of the uploaded document will be posted along with the upload.)

1.4 TOOL LIST WITH ABBREVIATIONS

The table below, **Exhibit 1-3: Abbreviation of Each Tool and Description**, includes the two or three character abbreviation of each tool, the full tool name, and the description of the tool.

ABBREVIATION	TOOL NAME	DESCRIPTION

BRA	Business Readiness Assessment	A Business Readiness Assessment measures the extent to which an FX Project OCM Representative or the Agency are prepared for the change. Different from the Change Readiness Assessment, this tool measures the vision message for clarity and consistency with FX overall, there is desire, willingness, and resolve to achieve the planned results, the compelling need remains undiluted, funding is clear and allocated, sponsorship and change champions are individually identified and prepared to meet resistance challenges, and responsible parties have appropriate authority and understand accountability. This change also notes all policies and procedures that must be evaluated for accuracy with project change.
CAT	Communications Approach Toolkit	The Communications Approach Toolkit identifies available communication channels for use with key stakeholder groups to communicate general information, risks, assumptions, and success stories, ensuring all messaging aligns with other ongoing internal and external communications standards and processes.
CC	Case for Change	The Case for Change tool is used to articulate the reason for change and provide a description of the project team's products or services.
CIP	Continuous Improvement Plan	The Continuous Improvement Plan is used to collect lessons learned across the project life cycle, which are incorporated as soon as possible into other projects starting or in progress.
CNA	Change Network Approach	The Coalition of Sponsors is a group of Change Champions making up the Change Network or social fabric of the organization. The Change Network Approach tool outlines the role and expectations of all Coalition of Sponsors. This tool identifies how a change champion might operate within their unit(s), how frequently communications will take place, and their reporting process to the sponsor where they cannot mitigate risk and/or resistance.
CP	Communications Plan	The structured Communication Plan allows the various team members to plan and focus on presenting the right messages, at the right time, via the right channel, from the right person(s), to the right people in concert with all other messaging in progress.
CS	Change Strategy	The Change Strategy sets the foundation for the magnitude of the change that is coming. A change can affect a specific group of end users or across bureaus. The data collected in this tool identifies the change characteristics and the risk level related to change acceptance.
CSA	Change Sustainability Approach	The Change Sustainability Approach incorporates metrics from other tools and documents project success metrics from the FX Project OCM Representative in discussion with OCM Services. These are clear, quantifiable, monitorable objectives.
CT	Communications Toolkit	The Communications Toolkit is the go-to reference document for the creation of all project communications pertaining to the change. The Communications Toolkit contains how the project is to be presented (what it is, why it is being done, key phraseology, benefits, etc.) and the branding of messages (look and feel).
II	Impact Index	The Impact Index is performed throughout the project to consider change and its potential impact across the Agency and other external stakeholders, tracking business area impacts (processes, systems, tools, job role, mindset, reporting structure, performance reviews, location).

SA	Stakeholder Analysis	The FX OCM Stakeholder Analysis is used to complete the project level Stakeholder Analysis to expand key stakeholders, their level of influence, and to what extent change impacts them.
SEP	Stakeholder Engagement Plan	The Stakeholder Engagement Plan specifies the activities and delivery methods the project team implements to inform and involve stakeholders at the appropriate Awareness, Desire, Knowledge, Ability, Reinforcement (ADKAR) state and confirms with the Project Sponsor that each message is appropriate for each audience.
SR	Sponsor Roadmap	The Sponsor Roadmap, created by the FX Project OCM Representative and OCM Services, assists the Project Sponsor and the Coalition of Sponsors to effectively support a project. This tool is used to focus messaging by audience, the timing for each message, how each audience is impacted by their message, the training for specific audiences, and the planning dates and logistics for those activities.
TAP	Training Approach and Plan	The Training Approach and Plan identify the delivery methods available (online tutorial, instructor led in-class, instructor led webinar, printed training guide, or as specifically directed and contracted by the Agency), the slide deck and document formatting, the consistency in terminology and acronyms, and modularization as needed and FX training objectives, scope, and success criteria. The Training Needs Analysis tool assists in identifying different audiences and their training needs and is a function of the Impact Analysis. The Training Curriculum articulates will include final training topics, audience, technology platform, and schedule outlined in the Training Approach and Plan and populated by the FX Project OCM Representative.

Exhibit 1-3: Abbreviation of Each Tool and Description