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Learner Guide

Change Impact Assessment

changesystems Creating Change Agility in Organisations

Contents

1 Purpose of the Change Impact Assessment Tool

The purpose of the Change Impact Assessment tool is to provide a consolidated view of the people impacts per project and per division.

It helps you to address the following questions:

1. Which business units or departments will be mostly impacted by the changes?
2. Which positions or roles will be mostly impacted by the changes?
3. Where do we need to focus our resources and our entity's attention to manage the change that needs to happen?

The Change Impact Assessment is an important tool that provides a consolidated view of multiple key changes that may be happening in an organisation.

2 Using the Change Impact Assessment Tool

The capture of information on the Change Impact Assessment tool is free of charge. Generating reports requires credits.

To start with, make sure that your account is set up and that you can buy credits.

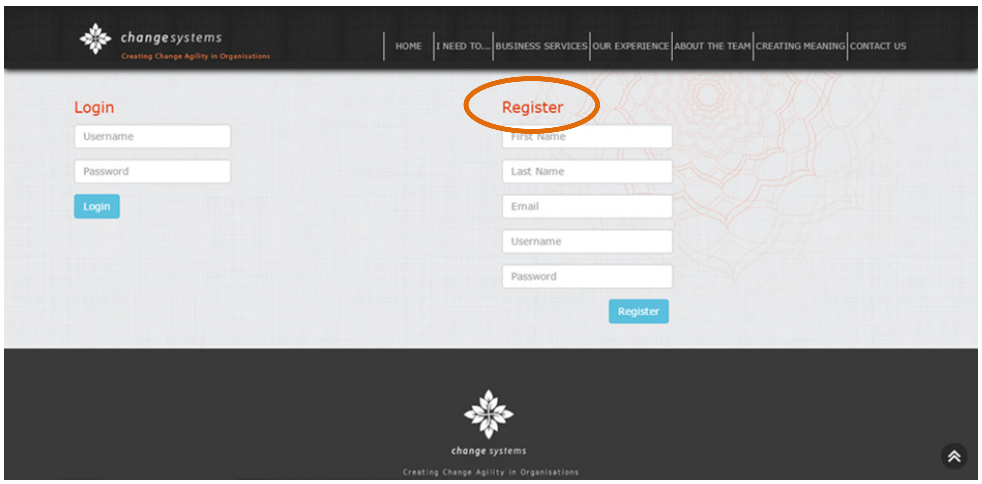
Credits can be bought as part of a company structure, in which case the Super User will assign credits to you.

Independent users can go into the tool online and buy their own credits. The e-commerce capability will facilitate such transactions.

3 Login

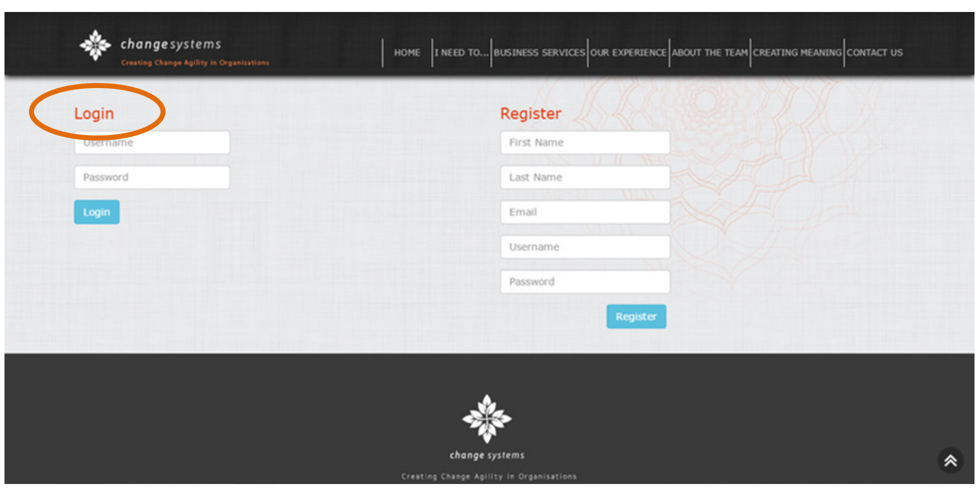
3.1 Register as a User

1. Type in your details to register as a user.
2. Click on the “Register” button.
3. Your Username and Password will be emailed to you.



3.2 Login for New and Existing Users

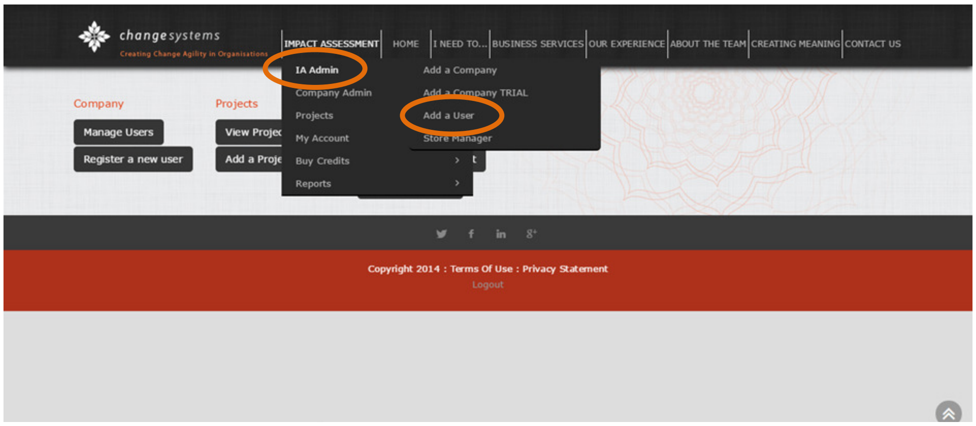
4. To login as a new or existing user, enter your Username and Password.
5. Click on the “Login” button.



4 Add a Company

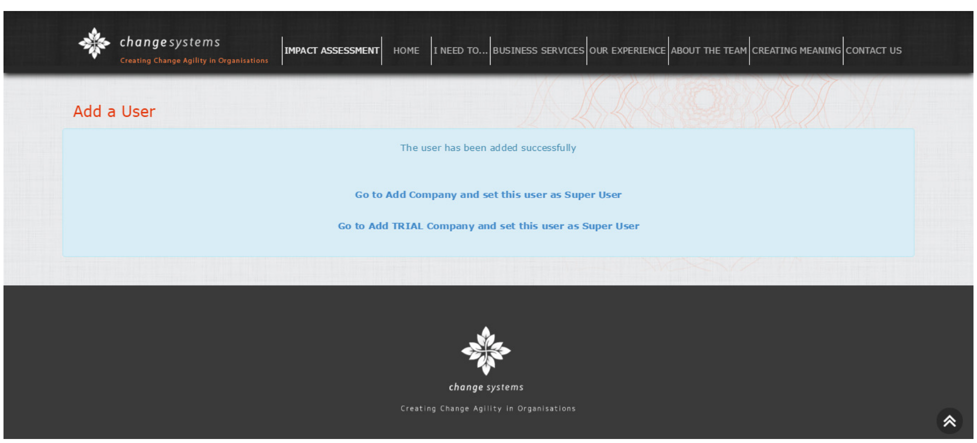
To add a company, you first have to create a user who will be that company's Super User.

4.1 Create a User



Under the menu item IMPACT ASSESSMENT:

1. Go to "IA Admin" and click "Add a User" in the menu.
2. Complete the user's details and click "Register".
3. Once the user is registered, the following message will appear:

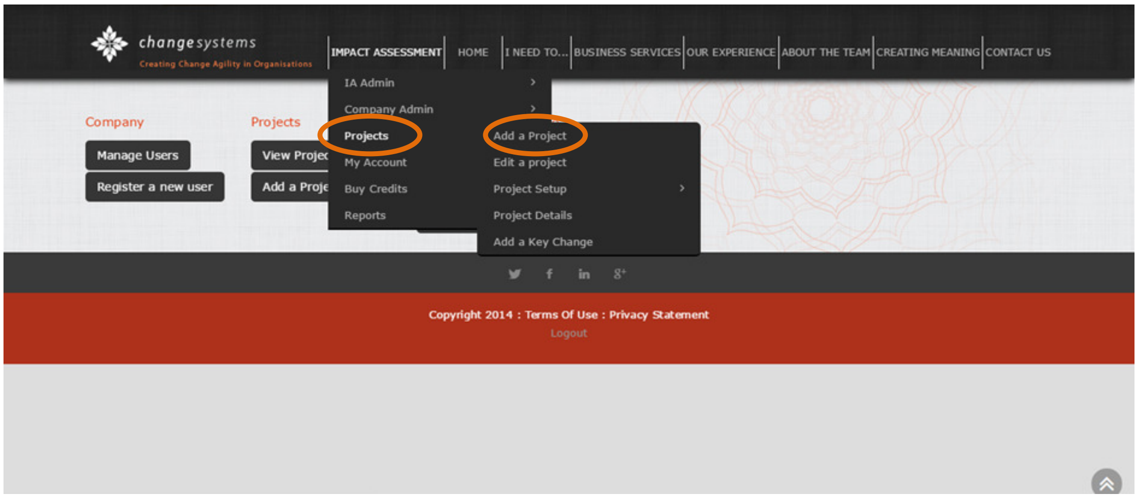


4.2 Add a Company

1. Click on the link "Go to Add Company" and set this user as Super User to add a new licensed company.

2. Or click “Go to Add TRIAL Company” and set this user as Super User to add a company in trial mode.
3. This will redirect you to the “Add a Company” screen.
4. Complete the company details and click “Add Company”.

5 Add a Project



To add a project, under the menu item IMPACT ASSESSMENT:

1. Go to “Projects” and click “Add a Project” in the menu.
2. A list of companies will be displayed under “Select a company for the project”. Click on “Select” next to the company that you want to add a project for.
3. Under “Add a project”, type in the project name and click on “Add Project”.

6 Set up Project Structures

Project structures are set up once, at the beginning of a project.

Do take the time to set up project structures properly. It will save you time and effort further down the line.

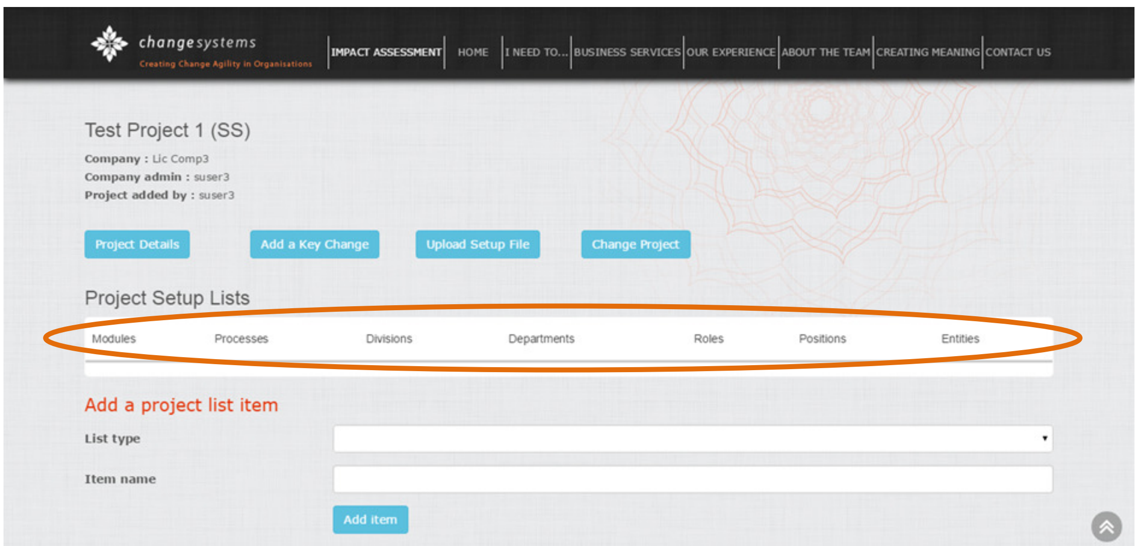
6.1 Project Setup Lists

In order to set up a project, Project Setup Lists have to be created as required for the particular project. Project Setup Lists include:

1. Modules
2. Processes
3. Divisions
4. Departments
5. Roles
6. Positions
7. Entities

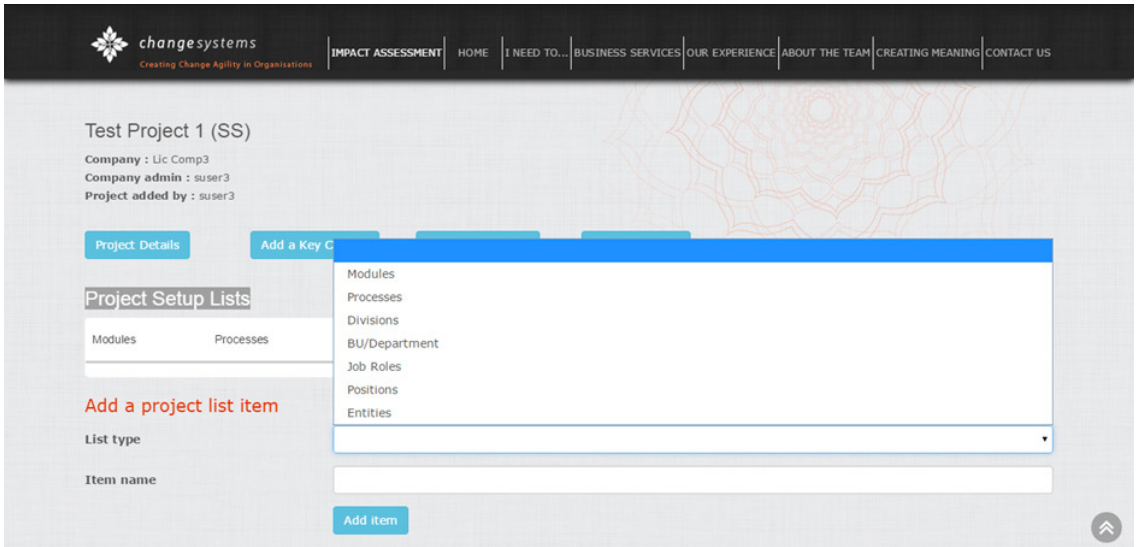
“Divisions” or “Departments” can be used; or both, depending on the structure of the particular project. Similarly, “Roles” and “Positions” can be used either / or / both.

“Entities” refer to who the resources are that will assist in executing the change, e.g. HR, Training, Line Managers, Project Managers, Leadership, etc.



6.2 Add Project List Items

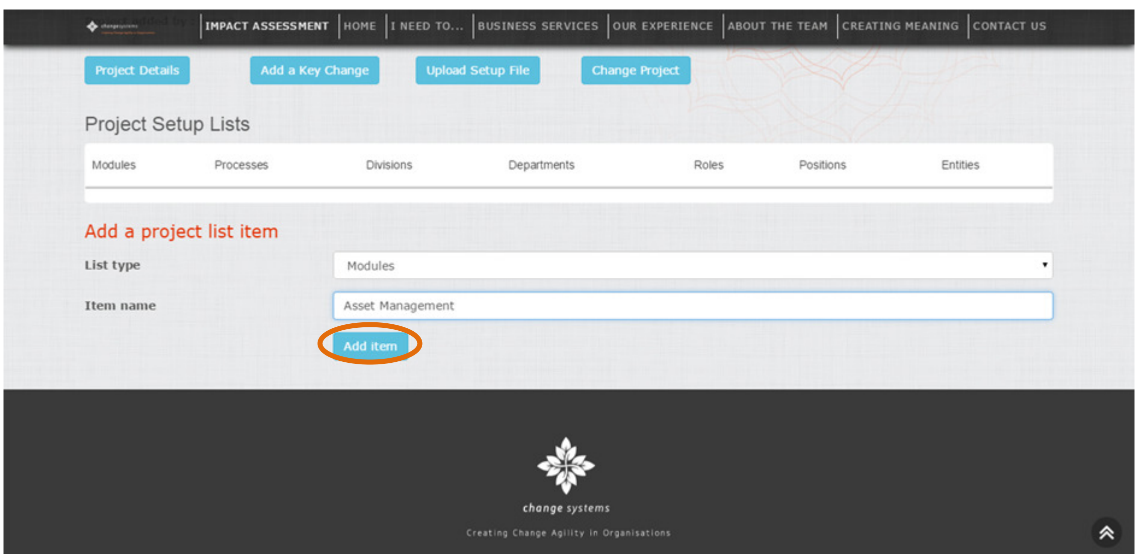
1. To add Project List Items, click on the arrow next to “List Type” to display the dropdown menu:



2. To add a "Module", select "Module" and type in the "Item name", e.g. "Asset Management", as displayed below.

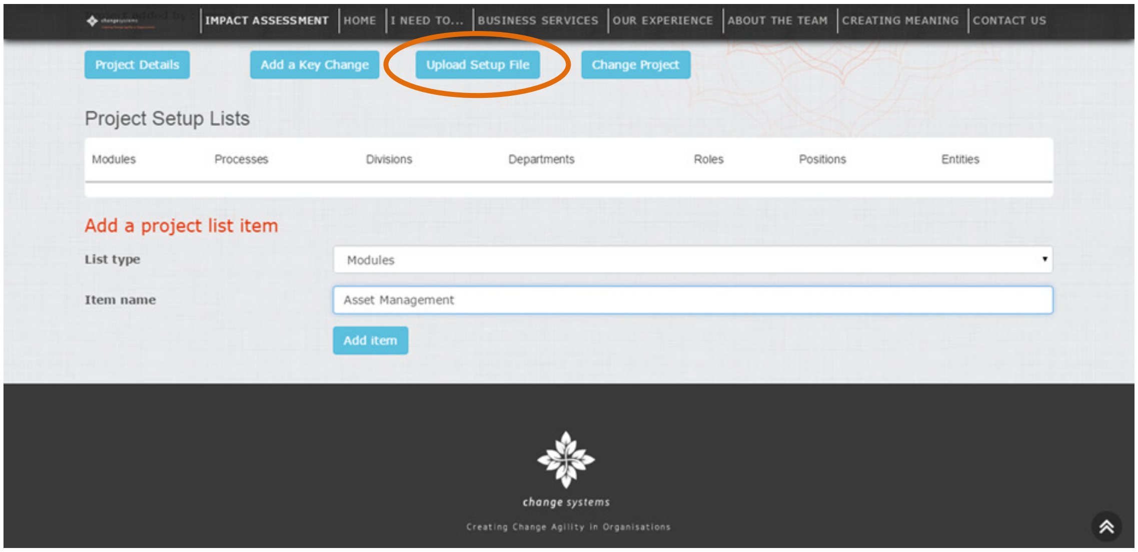
3. Click on "Add item".

4. Continue until all the relevant Project List Items have been set up. Or you can import bulk data to save time and effort (see section 6.3 below).

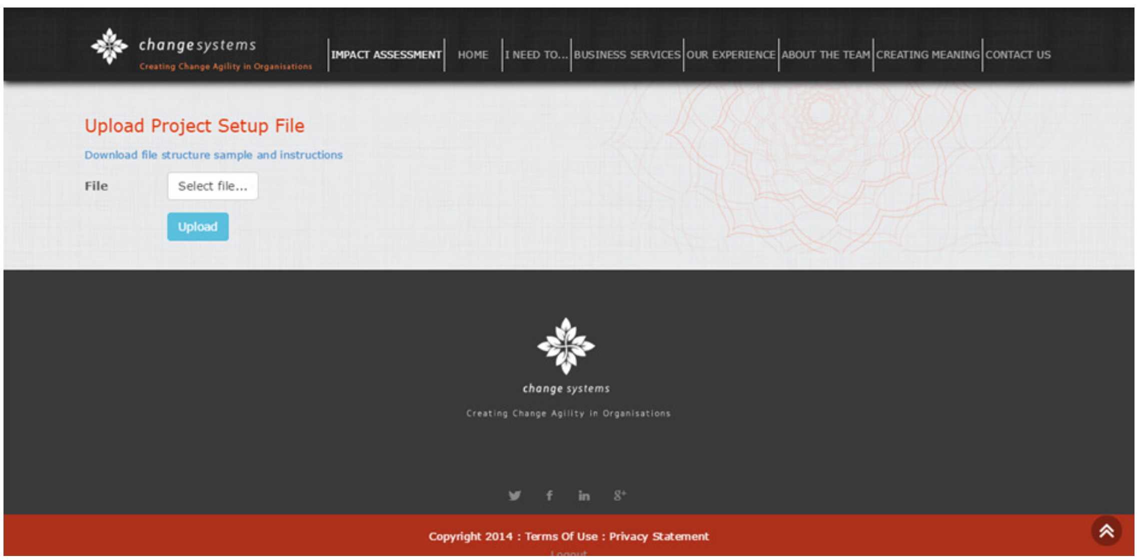


6.3 Upload Bulk Data

1. In order to upload bulk data files from your computer, click on "Upload Setup File".

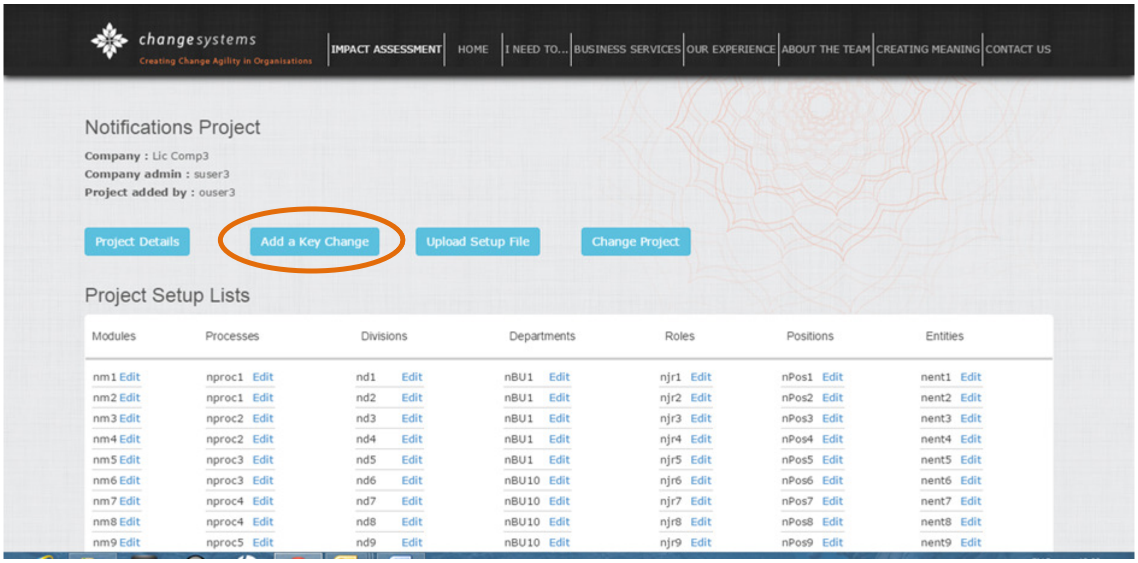


2. Click on “Select file…” to select a file for uploading from your computer.



7 Capture Key Changes

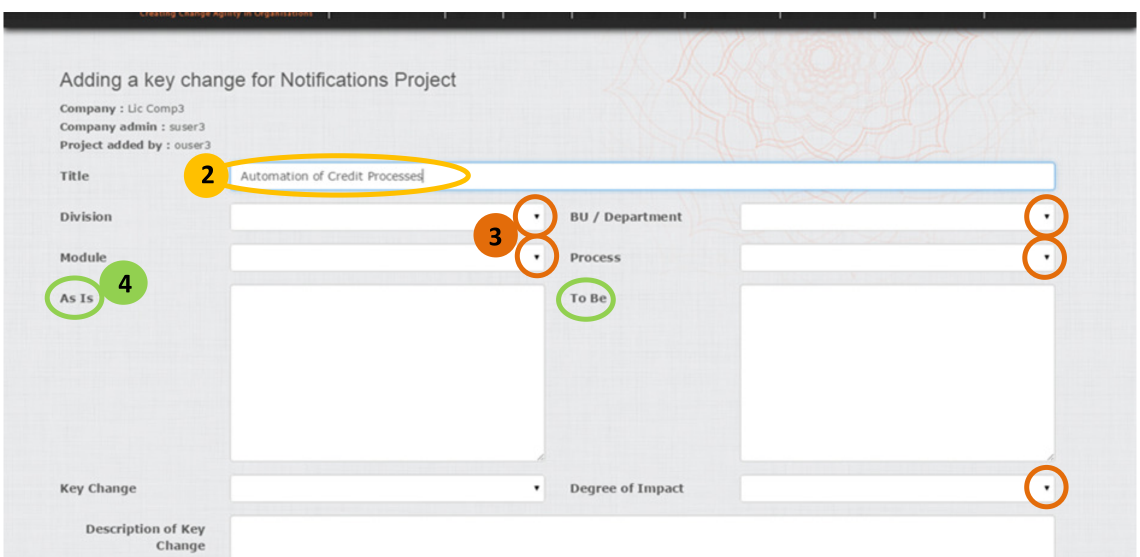
1. Click on “Add a Key Change”.

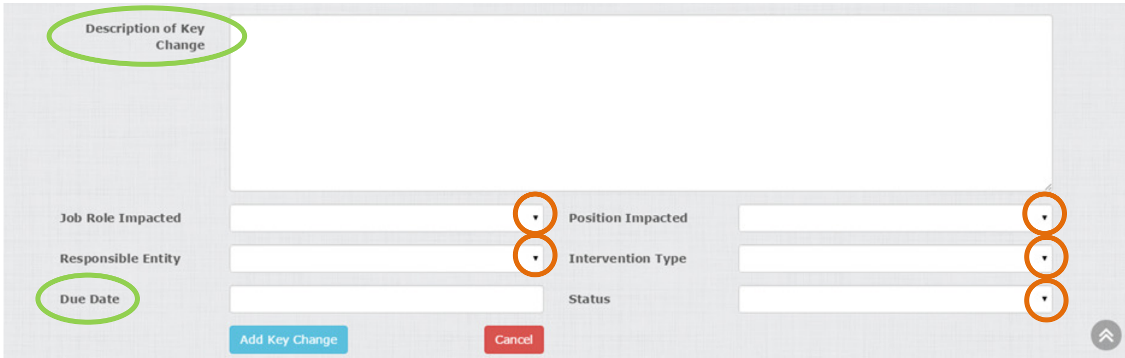


2. Type in the title of the key change, e.g. "Automation of Credit Processes".

3. Use the drop down arrows to select the applicable:

- Division
- Module
- BU / Department
- Process
- Degree of Impact
- Job Role Impacted
- Position Impacted
- Responsible Entity
- Intervention Type
- Status





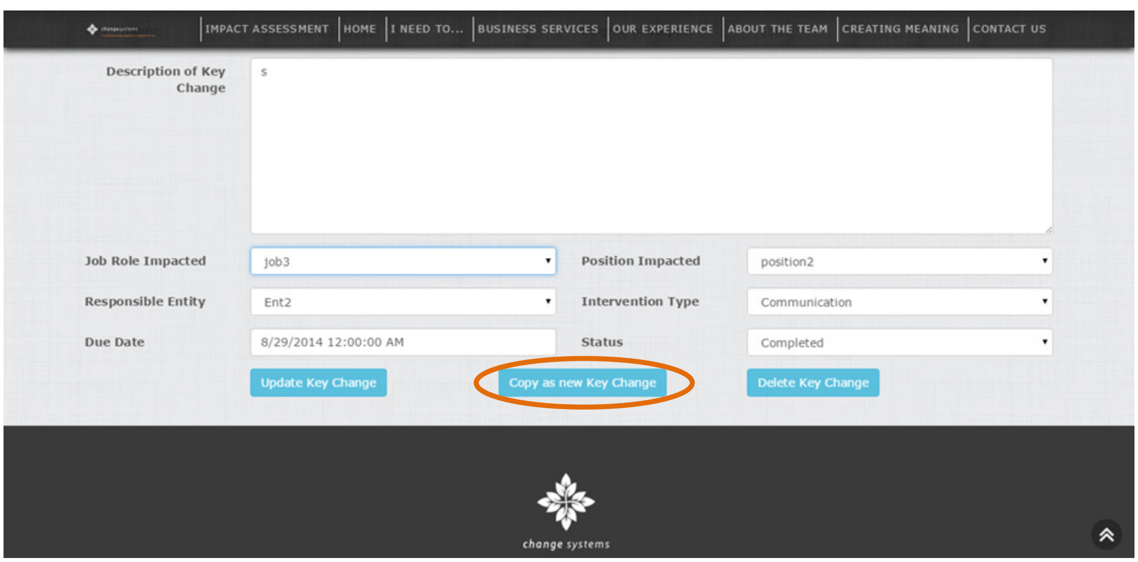
4. Type in the details for:

   - As Is
   - To Be
   - Description of Key Change
   - Due Date

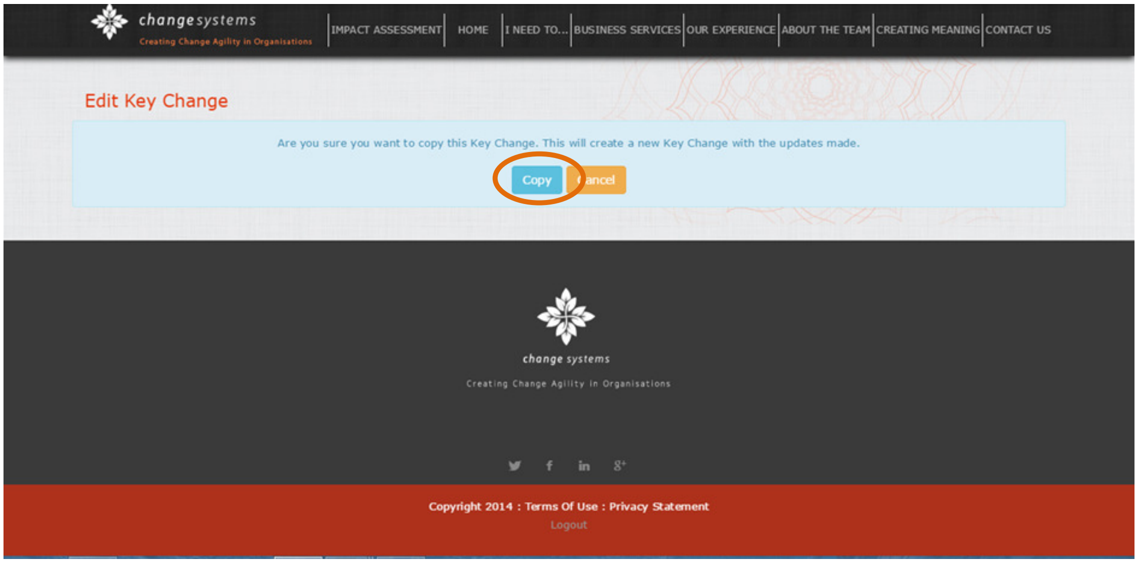
5. Click on "Add Key Change".

6. It is possible to use multiple selections if a Key Change affects, for example, more than one Job Role.

7. In this instance, click on "Copy as new Key Change".



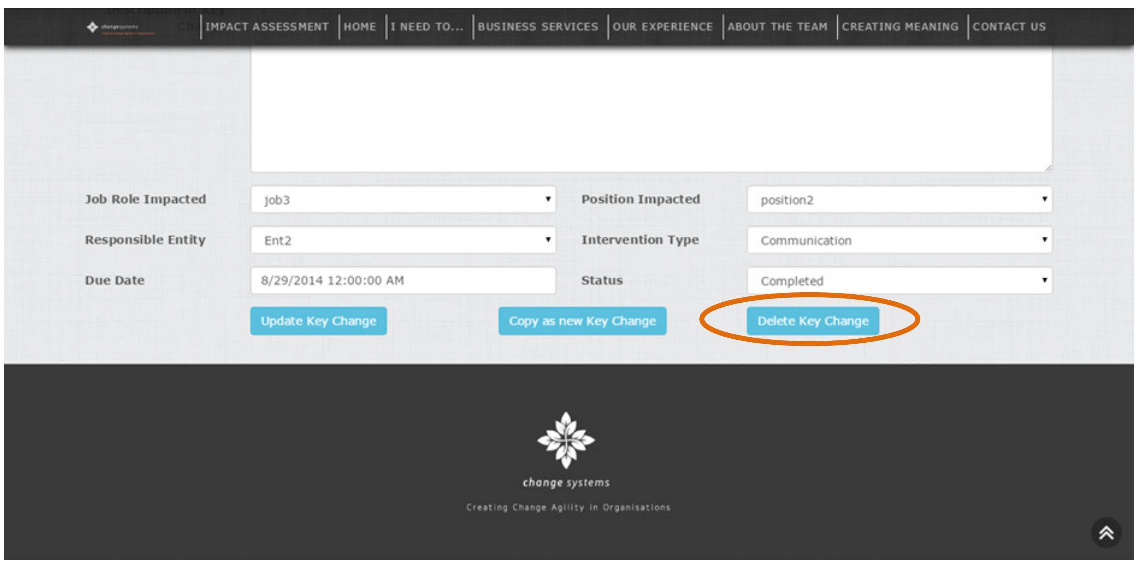
8. To confirm, click on "Copy".



Your Key Change will be duplicated with a new sequence number. All the content will be retained.

You can now edit the Key Change to indicate other areas impacted and/or differences in impact.

A Key Change can be deleted, e.g. if the Position is no longer impacted by the change.

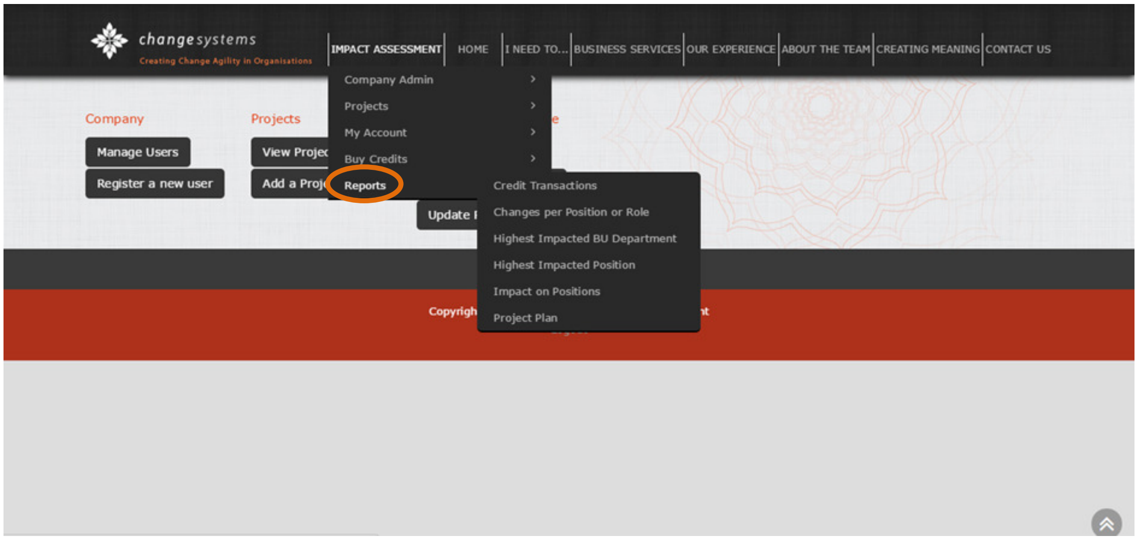


8 Run Reports

You must have enough credits to run reports.

Under the menu item IMPACT ASSESSMENT:

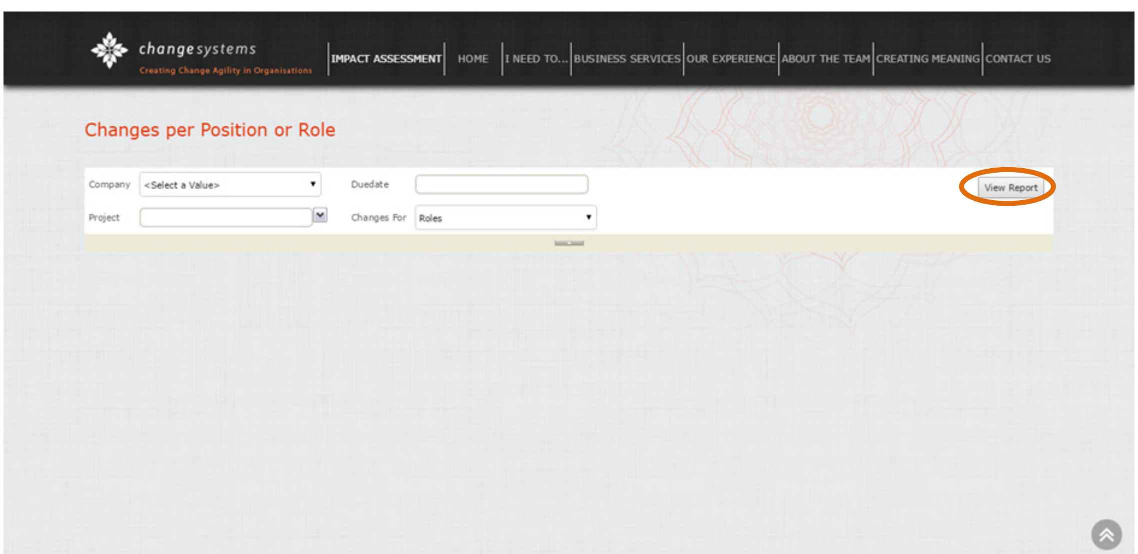
1. Go to “Reports” and click on the required report.



Example 1 – Report: Changes per Position or Role

This will give you a report on the key changes prioritised per either position or role.

1. Use the drop down arrows to select the applicable:
   - Company
   - Due Date
   - Project
   - Changes For
2. Click on “View Report”. Your report will be generated and displayed.

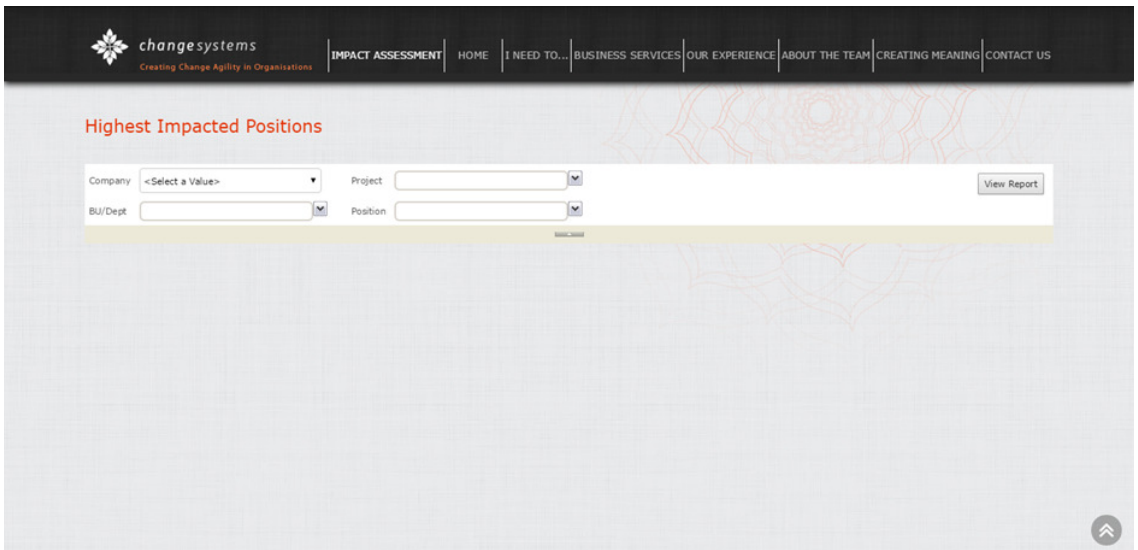


Example 2: Highest Impacted Positions

1. Use the drop down arrows to select the applicable:

    - Company
    - Project
    - BU / Dept
    - Position

2. Click on "View Report". Your report will be generated and displayed.



Reports are saved according to date entered. Thus reports drawn can be viewed again without paying.