DIGITAL PROJECT IMPLEMENTATION USER GUIDE

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Introduction

What is this guide for?

Congratulations on reaching the next step of your digital transformation journey! At this point, your organisation has already successfully carried out the preliminary steps of: recognising its IT needs and requirements, coming up with a comprehensive 3–5-year digital transformation roadmap or masterplan, sourced for IT vendors, and perhaps even executed relevant pilot tests to determine the feasibility of any potential systems to be implemented.

The purpose of this guide is therefore to answer the practical question of how these proposed systems and strategies may then be implemented in a sustainable manner to maximise the value of your organisation's digital transformation journey.

How do I use this guide?

This guide introduces a 3-pillar process (along with relevant templates) to support Social Service Agencies (SSAs) throughout the entirety of their IT implementations. We would therefore recommend that SSAs read through this guide in its entirely to: (1) Establish the clear framework for them to follow throughout their transformation journey. (2) Ensure that this process changes associated with the digital transformation is clearly identified and defined, and (3) To keep senior management and staff members updated and on track throughout the duration of the digital implementation project.

Pillar1: Project Management
The templates in this step are designed to help SSAs answer foundational questions such as: (1) *What* the project is about (*TQ Project Charter Template*), (2) *Who* is involved throughout each step of the project (*TQ Project Roles and Responsibilities Template* and *RACI Matrix Template*), and (3) *When* to carry out or proceed with each step of the transformation process (and in what order). It also includes evaluation systems such as the *TQ Project Risk Assessment Template, TQ Issue Tracking Template, and TQ Client/Staff Satisfaction Survey* to help SSAs mitigate any potential risks and pain points that may arise.

Pillar 2: Process Improvement
It is essential for SSAs to adopt a growth mindset to ensure that their implementation processes go smoothly. To this end, SSAs may use the templates here to identify areas of improvement in order to ensure the success and sustainability of their digital transformation efforts. These include the *5 Why(s) Root Cause Analysis Template,* the *Lean Waste Analysis Template*, the *TQ Gap Analysis Template,* the *TQ As-Is/To-Be Process Map template,* the *TQ Areas of Improvement Analysis Template,* and the *TQ After-Action Review Template.*

Pillar 3: Change Management Implementation
The final step of this process is for SSAs to identify stakeholders that can influence or will be impacted the most by the upcoming changes. Relevant templates here include the *TQ Stakeholder Analysis Template,* the *TQ Stakeholder Priority Matrix,* and the *TQ Stakeholder Communication Plan*, with the aim of helping SSAs obtain buy-in from these key stakeholders and encourage them to drive change across the organisation. SSAs may also make use of the job redesign templates (i.e.,

TQ Job Gap Evaluation Survey, TQ Job Gap Analysis, TQ Job Recruitment Template, TQ Training Plan and Schedule Template, and *Job Redesign Communication Template*) and realign their current job roles to cater to the operational requirements of the newly implemented digital systems.

Note: SSAs are encouraged to implement each pillar concurrently at the beginning and during an IT project implementation.

Pillar1: Project Management

Project Management (PM) refers to the process of ensuring that projects are firstly planned and secondly carried out in a way that adds value to SSAs and minimises both inefficiencies and cost-overruns from start to finish. PM typically involves some degree of team coordination and strategic resource allocation to help an SSA attain its goals, all while keeping scope, time and budget constraints in mind.

Acknowledging that SSAs are inherently well-versed in carrying out high-impact community centric projects, the templates here aim to re-introduce PM best practices within the context of digital transformation projects by (1) Building Strong Project Foundations, as well as (2) Establishing Mitigation Plans and Project Evaluation Systems.

Build Strong Project Foundations: What, Who(s) and When

SSAs should start off any project by first establishing a strong project foundation or common understanding that answers the following questions:

(1) What is the project about (or project objective)?

(2) Who is involved in the project?

(3) When should the project be completed by?

To accomplish this, SSAs may adopt the **TQ Project Charter Template** (see Figure 1) that provides a high-level one-page document of the key facts and objectives of the implementation. They may then, once that has been completed, move from the big picture overview to outlining the specifics of the project with the help of three further templates (as shown in Figures 2, 3 and 4).

PROJECT CHARTER EXAMPLE

Steps:
1. Fill in the project details as listed below.
Note: This document act as a constant frame of reference as your organisation embark on the digital solution implementation project.

Project Name	Volunteer Management System (VolMS) Pilot Project		
SSA Project Manager	Person A		
Project Commencement Date	1st March 2022	**Project End Date**	30th June 2022

Project Description	To introduce the staff to the new volunteer management system and assess the suitability and staff satisfaction of the new volunteer management system (VMS) system through an initial small-scale implementation project.		
Project Objectives	1. Introduce VMS to community coordinator team 2. Community coordinator team to transition their operations to VMS to further streamline their SOPs		
Project Scope	A VMS system will be introduced to asssist ths community coordinator team in keeping track of the number of current and incoming volunteers and managing them across different projects. At this stage, the system is to assist community coordinator team holistically and not the individual respective volunteering project team.		

		KPIs	Current	Goal
Project Outcomes	High staff transition and satisfaction rate of new VMS	Staff satisfaction rate	40%	70%

Project Deliverables	1. An effiecient VMS to assist coomunity coordinator team 2. Training workshop/sessions for the community coordinator team 3. IT support for community coordinator tram throughout 2-months pilot project

Constraints	Time	2 months
	Resources	VMS Vendor & Team of IT advisory experts
	Quality	High (quantifed by 70% satisfaction)
	Scope	To only involve the community coordinator team

Project Committee	Manager	Person A	**Team Members**	Person D
	Asst. Manager	Person B		Person E
	Vendor	Person C		Person F

Figure 1: TQ Project Charter Template (actual editable template available)

Scan the QR code to view or download this resource, or click here

The **TQ Project Roles and Responsibilities Template** (Figure 2) highlights the key tasks and project areas within an implementation and assigns staff members with the relevant expertise to each of those tasks accordingly. SSAs may use this template together with the **RACI matrix Template** (Figure 3) that determines whether the individuals involved in a project will be *Responsible*, *Accountable*, *Consulted* or *Informed* during each task, decision, or project milestone throughout the implementation.

Both these templates, when used together, provide a clear picture to those involved in a particular project area on how they collectively, as a team, can best contribute as well as who should be responsible for what during each phase of the project.

PROJECT ROLE & RESPONSIBILITIES EXAMPLE

Steps:

1. Based on your organisation's project needs, you can re-edit the project area, role and responsibilities needed. To assist, TQ has defined recommended project areas, roles and responsibilities in the table below.
2. Then, you can assign the person-in-charge to the defined roles. Do note that the details here can always be re-adjusted to your organisation's context.

Person In Charge (PIC)	Project Area	Role	Responsibilities
Person A	Organisation Architecture	Company Analyst	• Identify requirements of change project • Select measurement metrics and goals to track progress • Identify opportunities to create value in the organisation • Work alongside team representatives to craft effective change solutions
Persons B, C, D, and E	Change Management	Change Advisory Board (CAB)	• Make the final call on effectiveness of change strategies • Approve/reject proposed changes based on risk, disruptiveness, test results, etc. • Reviewing implemented changes, both successful and failed • Reviewing change schedule and roles • Assess risk and impact levels
Person F		Change Consultant	• Develop change management strategy plan • Assess existing company processes to determine areas of impact

Figure 2: TQ Project Roles and Responsibilities Template (actual editable template available)

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ROLES AND RESPONSIBILITY EXAMPLE
Responsible Accountable Consulted Informed (RACI) Matrix

Steps:
1. Identify the current roles in your organisation based on the classifications: e.g. (1) Project Leaders, (2) Project Team and (3) Project Sub-Team.
2. Then, choose from the drop-down list on whether the person-in-charge (as listed in the roles) is (1) responsible, (2) accountable or needs to be (3) consulted or (4) informed for each processes under the listed phases.

RACI MATRIX

Activity/Deliverable	Status	Sponsor	Project Sponsor	Steering Committee	Advisory Committee	Project Manager	Chief Technology Officer	Developer	Name or Role	Name or Role	Developer	Admin Support	Company Analyst
		Project Leaders				Project Team					Project Sub-Team		
Initiation Phase													
Process & Workflow Review		C	R			R	A		C			C	
Develop Business Case		I	A	I	I	R	C	C	C			C	
Plan Phase													
Build Project Charter		C	C			R	C	C	C				
Build Schedules, CPM, WBS And Gantt Chart		I	I	I	I	A	C	C	C	C	C	C	
Execution Phase													
Build Deliverables		I	C	C	C		R	R	A	R	A		
Create Change Strategies & Schedules		C	C	I	I	R	R	C	C	C	C	C	C
Control Phase													
Perform Change Management			C	C	C	R	A	A	A				
Monitor and track progress		I	I	I	I	R	R	A	A				
Closing Phase													
Create After Action Review		C	C	C	C	R	C	C	C	C	C	C	
Create Project Closure Report		I	I	I	I	R	I	I	I	I	I	I	

Definitions

R	Responsible	This group/individual is in charge and responsible for that part/phase of the project. A person who is 'Responsible' may be, for instance, the key process owner, the decision maker, and/or the key project coordinator.
A	Accountable	The project team/coordinator needs to inform this group/individual to seek permission or justify any form of decision making during this part/phase of the project.
C	Consulted	The project team/coordinator needs to seek advice from this group/individual during that part or phase of the project. It can also mean that this group/individual needs to be consulted on any of the decision-making processes involved during those parts or phases.
I	Informed	This group/individual needs to be kept in the loop with regards to what is going on during that part/phase of the project. These groups/individuals should therefore be updated via email or verbally informed about the project from time to time.

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Process & Workflow Review		C	R			R	A		C			C	
Develop Business Case		I	A	I	I	R	C	C	C			C	
Plan Phase													
Build Project Charter		C	C			R	C	C	C				
Build Schedules, CPM, WBS And Gantt Chart		I	I	I	I	A	C	C	C	C	C	C	
Execution Phase													
Build Deliverables		I	C	C	C		R	R	A	R	A		
Create Change Strategies & Schedules		C	C	I	I	R	R	C	C	C	C	C	C
Control Phase													
Perform Change Management			C	C	C	R	A	A	A				
Monitor and track progress		I	I	I	I	R	R	A	A				
Closing Phase													
Create After Action Review		C	C	C	C	R	C	C	C	C	C	C	
Create Project Closure Report		I	I	I	I	R	I	I	I	I	I	I	I

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I	Informed	This group/individual needs to be kept in the loop with regards to what is going on during that part/phase of the project. These groups/individuals should therefore be updated via email or verbally informed about the project from time to time.

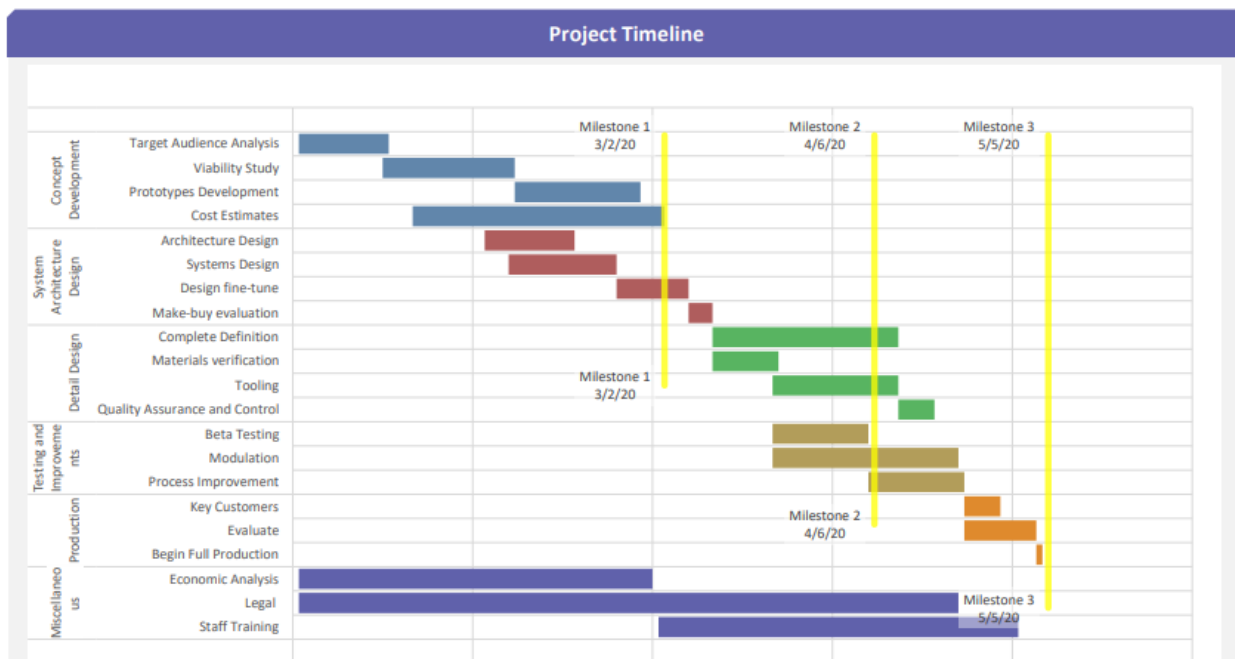*Figure 3: RACI Matrix Template (actual editable template available)*

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The end goal (or to-be state) of any transformation project may sometimes seem impossible to achieve within the set project duration. Setting clear, achievable milestones or objectives can help with this issue by allowing SSAs to (1) Visualise their progress better, (2) Reassure themselves that they are on the right track, and (3) Stay motivated to persevere despite any setbacks or complications that they may encounter throughout the project.

The **TQ Project Timeline Template** (Figure 4) (which is essentially a Gantt Chart) helps SSAs with precisely this by breaking down the project into time-based phases for teams to complete throughout each step of the project. The chart lists the tasks to be performed on the vertical axis and displays time intervals on the horizontal axis. The width of the horizontal bars in the graph shows the expected duration and illustrates the start and finish dates of each of these activities.

Having the Gantt Chart as a visual timeline aid is helpful for ensuring that an SSA's adoption of new IT system(s) is in accordance with its digital transformation masterplan and assists it in planning out the implementation of those systems over time.

PROJECT TIMELINE GANTT CHART WITH MILESTONES

Steps:

1. At the "timeline date entry" table, feel free to edit the categories and tasks that best suit your project and organisation's context. Changes in these two columns will be reflected in the Gantt chart.

2. Then, fill in the purpled coloured "start" and "end" columns with the respective dates (format: month/date/year or mm/dd/yy), as well as choose the colour on the drop-down list in the purple-coloured column entitled "colour".

3. These changes will be automatically reflected in the Gantt chart and blue-green columns in the "timeline date entry" table and "timeline milestone entry table".

Do note that columns with blue-green headers are not to be edited.

Figure 4: TQ Project Timeline Template (actual editable template available)

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Establish Risk Mitigation

It is important to recognise when carrying out PM that each project comes with its own set of challenges and potential areas of improvement. As the adage goes "prevention is better than cure" and SSAs may take this saying to heart by establishing mitigation plans with the help of the **TQ Project Risk Assessment Template** (Figure 5).

The template may be used by project leads to identify potential risks (that should be clearly spelt out with the help of detailed descriptions and clear risk categories) along with their respective levels of severity (or priority), which will then initiate the formation of effective and targeted counterstrategies or backup plans to help mitigate these issues as they arise.

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PROJECT RISK ASSESSMENT EXAMPLE

Risk Categories:	
SR: Staff Risk	TR: Time Risk
RR: Resource Risk	QR: Quality Risk
CR: Company Risk	

Steps:
1. Identify any potential risks that may occur during the project. These risks can be (1) internal or (2) external.
2. These risks can be further elaborated to provide more context.
3. These risk can then be categorised as (1) staff risk (SR), (2) resource risk (RR), (3) company risk (CR), (4) time risk (TR) and/or (5) quality risk (QR).
4. Following that, determine the level of serverity of those risk as (1) low, (2) medium or (3) high.

No.	Potential Risk	Description	Risk Category	Severity	Lessons Learned & Risk Mitigation
INTERNAL RISKS					
1	Lack of and limited staff buy-in	Staff resistance to use new system due to unfamiliarity with the proposed digital system and project purpose	SR	High	Provide staff training and support channels; Change Management to be discussed and planned prior to start of project.
2	VMS working group were unable to differentiate between prioritized features from ones that were not baseline requirement features.	Staff enthusiasm caused a spike in new requests, therefore affected the timeline and deliverables during the development and UAT stages	RR ; TR	Medium	Improved scope of work and requirements gathering should be done at the very beginning before development. Additional features requested should also be discussed with developers and not included into UAT tracker.
EXTERNAL RISKS					
1	Limited manpower assigned to project	Due to the number of new requests and the limited number of developers first assigned to the project, adapting to said requests proved more difficult and additional time was needed for implementation by developers.	RR	High	Improved scope of work and requirements gathering should be done at the very beginning before development. This may require investing additional time for requirements gathering and user journey
2	Lack of clarity around project management role	It wasn't clear to LCSS or TQ who would be the acting project manager for the IT vendor. LCSS felt they were the ones to eventually take on project management role. This was due to miscommunication and misaligned expectations.	CR	Medium	Clarity on role and expectations to be clearly discussed prior to start of project between LCSS, Consultants, and IT Vendor. Because TQ was both the Consultants and IT Vendor, this overlap led to confusion.

Figure 5: TQ Project Risk Assessment Template (actual editable template available)

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TQ Issue Tracking Template (Figure 6) may be used to track issues reported by users and receive status updates from individual IT specialists so that any potential issues may be addressed as soon as they arise. This tool is most commonly used during User Acceptance Testing (UAT) phase.

USER ACCEPTANCE TESTING (UAT) ISSUE TRACKER EXAMPLE

Steps:
1. Identify the module(or digital solution) that you wish to conduct user acceptance testing (UAT) on, as well as the start date.
2. Fill in the issues raised by staff in adopting the system, as well as the other details as highlighted in the columns.
3. To determine issue priority and status, refer to the sheet entitled "Legends".

UAT Start Date: 17th October 2022
Module: Task Automation System

Issue No	Raised Date	Raised By	Process (To be associated with a test case)	Issue Description (Include: what device/browser you are using; what time you have encountered the issue; what was the user account that encountered the issue; whether you can replicate the issue & what are the steps taken to replicate it)	Priority	Assigned To	Status	Expected Closure Date	Additional Remarks	Closed Date	Closed By
1	20/10/2022	Person A	Unable to find automated files	For the volunteer management system (VMS), admin staff could not find the automated file on Microsoft Sharepoint when volunteer send in their application through the VMS.	Low	Person D	Fixed	25/10/2022	N/A	26/10/2022	Person D
2	23/10/2022	Person B	Task automated system crashed resulting in loss of files	When community coordinator was transfering huge backlog of clients (e.g., elderly) files and documents, the client management system (CMS) crashed and the client files including the ones in old cloud system were deleted.	High	Person E	Reopened	5/11/2022	N/A	7/11/2022	Person E
3	24/10/2022	Person C	HR Tasks not automated	Completion of interview ticket for upcoming hires not automated.	Medium	Person F	Need clarification	27/10/2022	N/A	28/10/2022	Person F

Figure 6: TQ Issue Tracking Template (actual editable template available)

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Evaluate Project Success

Towards the end of the Project Implementation, it is time to start planning for Project Evaluation. This is to assess the success and satisfaction of the overall project implementation (i.e., the planning, the IT solution, the IT vendor, etc.).

This evaluation occurs <u>after</u> "Go-Live" of the IT system/solution (i.e., after the system has finished the majority of the development phase, users have been trained on how to use the new system, and staff have had sufficient time to incorporate the new system into ther day-to-day operations).

The **TQ Staff/Client Satisfaction Survey** (Figure 7) is a survey that SSAs may distribute to their users for them to measure the overall success of the digital implementation project. The TQ Staff/Client Satisfaction Survey allows their users to provide much-needed context on (1) System implementations & usefulness of IT solutions, (2) Overall IT experience, and (3) Overall levels of user satisfaction, along with any additional feedback.

A user satisfaction level of 70% or above is typically a key indicator of good performance for transformation projects.

Steps:

1. To access staff(s) or client(s) satisfaction on the new digital system or solution, administer the following template survey to them.
2. Enter the link (here), duplicate it to your organisation cloud system and edit it based on your preference or create a new feedback form using the PDF draft below as a guide.
3. Ask your staff(s) or client(s) to fill in the survey and you can then gauge their satisfaction on the new digital system or solution.

Staff/Client Satisfaction

The survey will take approximately 4 minutes to complete.

Objectives: To collect staffs or clients feedback and experience regarding the new digital solution(s) or system(s) that currently being rolled-out and implemented at your organisation

(In the survey questions, "IT Solution" and "IT System" refers to the new system implemented.)

IMPORTANT: All interviewees and their personal details will remain anonymous throughout the course of this report.

. . .

* Required

Personal Information

1. Email Address *

   Enter your answer

2. Role / Job Title *

   Enter your answer

3. Department / Team / Centre *

   Enter your answer

   Next

Figure 7: Staff/Client Satisfaction Template (actual editable template available)

Scan the QR code to view or download this resource, or click [here](#)

SSAs are recommended to use **TQ KPI Reporting Template** (Figure 8) by referencing the metrics in the TQ Staff/Client Satisfaction Survey to measure the success of their project implementation. SSAs can also come up with other KPIs that are relevant to their digital implementation project and organisational standards of increased productivity, collaboration and satisfaction.

KPI REPORTING EXAMPLE

Steps:
1. To remain accountable, determine the person-in-charge (usually the project manager) to fill in the KPI reporting, and that person can input the last updated date to ensure that data best reflect the current progress.
2. Based on your project objective, determine the expected outcomes (or measurement of success) of the project.
3. Next, identify where the data should be collected form
4. Set the metrics (or KPI for tracking) which allow to identify the data points needed to quantify the success.
5. Based on the metrics set, input the target in numeric format.
6. Once that is set, input the actual outcomes.
7. Percentages for the success rate will be automated. To understand the percentages obtained, you can refer to the rubric below, or edit the rubic to your discretion.
8. The data input are automatically reflected in the graph below.

Note: You can use TQ User Satisfaction Survey to measure and report KPIs #1-5. Additional KPIs can be determined internally within the organisation and added below.

Updated by:	Project Manager
Last Updated on:	Saturday, January 1, 2022

No.	Measurement of Success (What is the expected outcome of the project?)	Data Collection Methods / Sources (How is the data collected?)	KPI (What metrics should the organisation track?)	Target/ Maximum Score (in numbers)	Actual (in numbers)	Percentage (%)	Expected Timeline to achieve minimum KPI
1	Staffs in the relevant Departments are using the IT Solution on a day-to-day basis	User Satisfaction Survey - % of users in organisation	# number of respondents in the user satisfaction survey	40	22	55	6 months
2	The IT solution implemented is useful (i.e., reduce operations time, etc.)	User Satisfaction Survey - Section 1: Implementation & Usefulness of IT Solution (Satisfaction %)	% total percentage of "agree" and "strongly agree" rankings for implementation & usefulness of IT solution	100	65	65	6 months
3	Staffs felt that their top management assisted in their journey to transition from their previous work processes to using the new IT management system.	User Satisfaction Survey - Section 2: Change Management Planning and Implementation (Satisfaction %)	% total percentage of "agree" and "strongly agree" rankings for change management & implementation	100	80	80	6 months
4	The IT vendor outsourced provide quality services and were efficient	User Satisfaction Survey - Section 3: IT Vendor Experience (Satisfaction %)	% total percentage of "agree" and "strongly agree" rankings for IT Vendor experience	100	50	50	6 months
5	Staffs involved are overall satisfied with the digital implementation consultancy (DIC) project	User Satisfaction Survey - Section 4: Overall Satisfaction Survey (Satisfaction %)	% total percentage of "agree" and "strongly agree" rankings for overall satisfaction	100	70	70	6 months
6						0	
7						0	
8						0	
9						0	
10						0	

| Rubric	
Percentages	**Meaning**
Below 50%	The outcomes of your digital implementation project have not been fulfilled. Your organisation can conduct interviews and gap analyses to identify issues, risks and obstacles to the implementation project, and then devise strategies to solve them.
50 to 69%	Your organisation has moderately achieved the project outcomes, but there are areas of improvements for your organisation to consider moving forward.
70% and above	Congratulations for achieving the satisfaction percentage. Your organisation is on the right track for successful digital implementation!
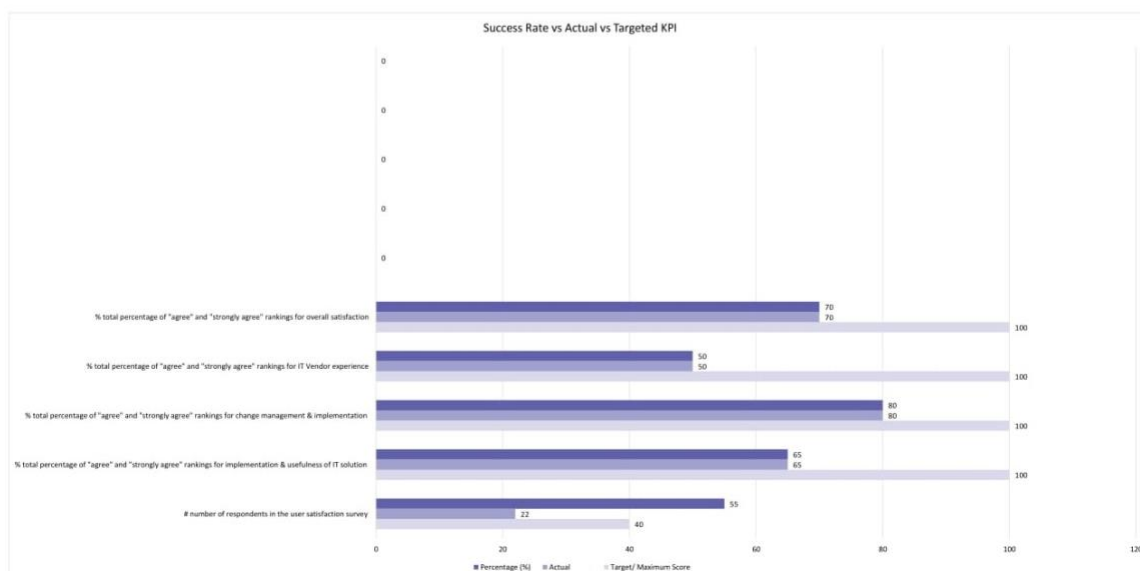
Figure 8: TQ KPI Reporting Template (actual editable template available)

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Pillar 2. Process Improvement

Continuous process improvement refers to the act of adopting a growth mindset to enhance the tools, services, or processes that are offered or put in place by SSAs. These efforts, when made consistently throughout a project's duration typically results in incremental improvements over time. Having such a growth mindset during the post-pilot or implementation phase may also lead to quick improvements within a short timeframe.

We would therefore recommend that SSAs strive for process improvement by (1) analysing their current processes, (2) utilising the results of this analysis to come up with next steps going forward, and (3) continuously evaluating the efficacy of their efforts with the help of an after-action-review (AAR) to ensure the success of their implementation efforts.

Analyse Current Processes

Many organisations are under the assumption that digital transformation is a linear or stepwise process that consists of clear start and end points. However, the reality is that digital changes occur cyclically and gradually throughout the duration of an SSA's operations, which results in various issues such as inefficient processes and workflows, siloed departments, and overly complicated systems along the way.

TQ has therefore compiled a list of four process improvement analysis tools or methodologies (along with a description of their primary functions) for SSAs to consider making use of:

(A) 5 Why(s) Root Cause Analysis
This tool should be used if an SSA encounters a single or a few persistent, well-defined issues during its digital transformation, as it can help to uncover the root cause of those issues and assist SSAs in taking their next steps forward.

(B) Lean Waste Analysis
For SSAs that are unsure on where to start in their transformation journeys, this framework assists in identifying potential areas of improvement and helps them eliminate the "8 wastes of lean" that could potentially cause a wastage of resources during the transformation.

(C) Gap Analysis
A useful framework for SSAs to use when a current or implemented IT system does not meet their digital transformation objectives. This template compares a system's expected performance with its actual performance and identifies areas of improvements from there.

(D) As-Is/To-Be Mapping
A helpful tool that may be used by SSAs to recognise their current or "as-is" states and their end-goal or "to-be" states in order to construct a suitable IT system process flow. This type of As-

Is/To-Be Mapping acts as an SSA's visual aid to help them determine if any steps should be added to or eliminated from their current processes.

While it is true that utilising all four of these tools allows for a comprehensive analysis of an organisation's current state, we would recommend that SSAs only make use of tools that are relevant to their current issues to avoid having to add on more systems unnecessarily.

5 Why(s) Root Cause Analysis to Identify Underlying Root Cause

It is essential for SSAs to first identify and understand the root cause of a problem (rather than simply acknowledging the presence of surface level symptoms) in order to eliminate the systemic bottleneck caused by that particular issue. To this end, they may choose to use the **TQ 5 Why(s) Root Cause Analysis template** (Figure 9) to first define the problem statement and ask a series of 'why' questions in succession until the root cause of the problem is reached. Doing so will allow them to tackle the issue at a fundamental level by implementing a solution to deal with and eliminate the problem at its core.

5 WHY ROOT CAUSE ANALYSIS EXAMPLE

Steps:
1. Define the problem currently faced by your organisation.
2. Determine the primary cause by asking "why the problem occurred".
3. Then ask the question "why is that" four more times to determine the root cause.
4. Based on the root cause identified, ideate a digital solution that can address the problem and root cause identified.
5. Lastly, determine the person who will be responsible to address the issue, the step needed to begin carrying out the solutions and the proejcted completion date.

DEFINE THE PROBLEM
The payroll for all employees are late by a week.

WHAT IS THE ROOT CAUSE?

PRIMARY CAUSE
Why the problem occured?
1. Because the accountant approved the payroll 3 days late.

Why is that?
2. Because the accountant was on a sick leave.

Why is that?
3. Because there was no substitute for her role.

Why is that?
4. Because the organisation had not planned for emergency leaves for the accountant.

Why is that?
5. Because the organisation had not made any sop around emergency leaves. — ROOT CAUSE

NOTE: Go back to the previous "why", if there is no controllable solution.

SOLUTION
Use an automated accounting software to process payrolls on time.

WHO IS RESPONSIBLE
Anna from IT Department

WHEN TO BEGIN
Research for accounting software

COMPLETION DATE
27-Apr-21

Figure 9: 5 Why(s) Root Cause Analysis Template (actual editable template available)

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Lean Waste Analysis to Streamline Downtime Processes

The Lean Thinking framework is an approach that focuses on improving work processes to ensure that they are of value. Waste analysis is one of the core principles of this framework that involves **identifying, quantifying, eliminating** and **preventing** waste from various areas. Many Lean concepts and tools focus on continually identifying, describing and eliminating such systems and operations that are either inefficient, resource draining, or do not add value.

A waste is defined as any action or step in a process that does not add value to the client or customer. SSAs may employ the **Lean Waste Analysis Template** (Figure 10) to streamline their current digital solutions, systems, and standard operating procedures in an attempt to eliminate the 8 'wastes', (1) Defects, (2) Overproduction, (3) Waiting, (4) Non-utilised talent, (5) Transportation, (6) Inventory, (7) Motion, and (8) Extra processing/Insufficient operations that typically exist within an organisation. The template provides clear definitions and explanations for each of these wastes.

SSAs should aim to describe and classify their wastes according to the degree of negative impact that each of them could potentially have on their digital implementation projects. They may then categorise these wastes into one of three levels (high, medium or low) in order to decide which of them should be tackled first.

8 WASTES OF LEAN (DOWNTIME) ANALYSIS EXAMPLE

Steps:

1. Based on the 8 types of wastes as listed below, elaborate the current issues that your organisation is facing that is contributing to the inefficiencies.
2. Then, the level of waste can be categorised as (1) high, (2) medium or (3) low:

HIGH
MEDIUM
LOW

Waste	Occurrences & Description	Level of Waste
Defects Inaccurate or incomplete information and services	1. Constantly missed deadlines 2. Wrong advice given to beneficiaries 3. Some services do not serve client needs	MEDIUM
Overproduction Making something sooner / at larger quantities than required	1. Conducting unnecessary diagnostic procedures on clients 2. Keeping both hard and soft copies of documents 3. Making 2 extra copies of each report	HIGH
Waiting Waiting on people, information, materials, etc.	1. Waiting for approvals from management 2. Beneficiary wait time to receive services 3. Certain staff waiting for tasks	MEDIUM
Non-Utilized Talent Not fully making use of the skills, experience, or knowledge of employees	1. Lack of engagement & discussion with staff 2. Lack of employee training 3. Poor employee matching with relevant skills	LOW
Transportation Moving items or information unnecessarily	1. Reports undergo multiple reviews 2. Poor building layout resulting in a long distance between reception and counsellor's office 3. Resending emails	LOW
Inventory Collecting information, data, etc., beyond what is required	1. Accumulating data for data entry 2. Storing additional beneficiary information than necessary 3. Pile up of pantry supplies	HIGH
Motion Non-value-adding motion by employees	1. Poor building layout resulting in extra walking time for staff 2. Switching between too many applications 3. Walking to and from copy machine	MEDIUM
Extra Processing/Inefficient Operations Non-value-adding processes or steps by employees	1. Unneeded fields in beneficiary registration form 2. Additional sections in report 3. Extra document formatting & design	HIGH

Figure 10: Lean Waste Analysis Template (actual editable template available)

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Gap Analysis to Provide Clarity on Digital Project Implementations Expectations and Reality

A gap analysis is a process which SSAs may use to compare the performance of their current information systems or use of software applications against their expected levels of performance, with the ultimate aim of identifying any gaps or shortcomings within these organisational processes. Gaps refer to the deficiencies present within an organisation's existing or as-is state and may be used to identify factors that are needed by a particular organisation to reach its target or to-be state.

Gap analysis is important as it helps an SSA to determine if it is operating at its fullest potential, and if not, why. It also helps to identify flaws in resource allocation, planning, production, and so on that may have gone undetected.

The first step in gap analysis is to identify any gaps in the areas of technology or progress once the change project has commenced. SSAs can accomplish this by using the **TQ Gap Analysis** (Figure 11) which aims to assist SSAs in recognising gaps in their organisational capabilities and strategies so that they may be filled as soon as possible. This will help them to improve and refine their digital change strategies as the project progresses and adapt their initial plans according to various developments and requirements as they present themselves.

GAP ANALYSIS EXAMPLE

Steps:
1. During the digital implementation process, identify the business requirements your organisation is facing.
2. Then, elaborate the existing situation and limitations.
3. Once you have a clearer understanding of your current change management implementation gaps, identify the new resources and capabilities required to fill those gaps.
4. Lastly, compare the gaps between the existing resources and required capabilities to fulfil the business requirements.

| BUSINESS REQUIREMENT	EXISTING SITUATION & LIMITATIONS	NEW CAPABILITIES REQUIRED TO IMPROVE	GAPS BETWEEN EXISTING AND REQUIRED CAPABILITIES
Email migration to Microsoft 365	No vendor appointed for email migration yet. No discussion on the subject with vendor (that handles on-premise emails). Kept on lowest priority to avoid confusions that will arise from having two systems in place.	Connect the existing emails to Microsoft and forward the emails to the old system.	The migration should be done by-department. Leaders should allocate a date to move from the old system to the new system to minimize confusion and inefficiencies over parallel run.
Data Governance & Data Management	Data protection, retention, classification policies etc. depend on the files on SharePoint and the email addresses. Migration needs to be completed first. DMS & VMS are handled by another vendor and are built on Microsoft PowerApps. Each management system is going to share the same database.	The system being built should not be a "copy-paste" base design and should be customised for specific use cases. The data fields should be separated for the ease of analysis later. Individual identifier in VMS should be the phone number or email address of the individual. The database should be a split database (utilizing a central contact object).	Once the migrations are done, discussion is needed with vendor on requirements. Request for the vendor to provide an ERD (Entity Relationship Diagram) to be reviewed and corrected.
Human Resources (HR) system integration with Finance System	The Finance system utilized Navision integrated with Nhelp. There are issues in automated data sharing between the HR system and Finance system due to confidentiality and auditing.	System should be designed with an export data feature.	Discuss with Whyze Solutions on exporting data (payroll, claims, etc. into a standardised format to which it can be manually verified either before or after importing into Navison.

Figure 11: TQ Gap Analysis Template (actual editable template available)

Scan the QR code to view or download this resource, or click here

Once the various departmental and operational processes have been identified and benchmarked, SSAs may use the **TQ As-Is / To-Be Process Map template** (Figure 12) to first capture their current "as-is" state processes and workflows and identify various pain points within those processes. They may then create a "to-be" process map that illustrates the desired future state of the new processes (ideally with higher efficiencies and workflows). Having such a template allows SSAs to identify the parts of each process that need improvement as well as the specific changes that need to be made within those processes, with the aim of reducing process inefficiencies.
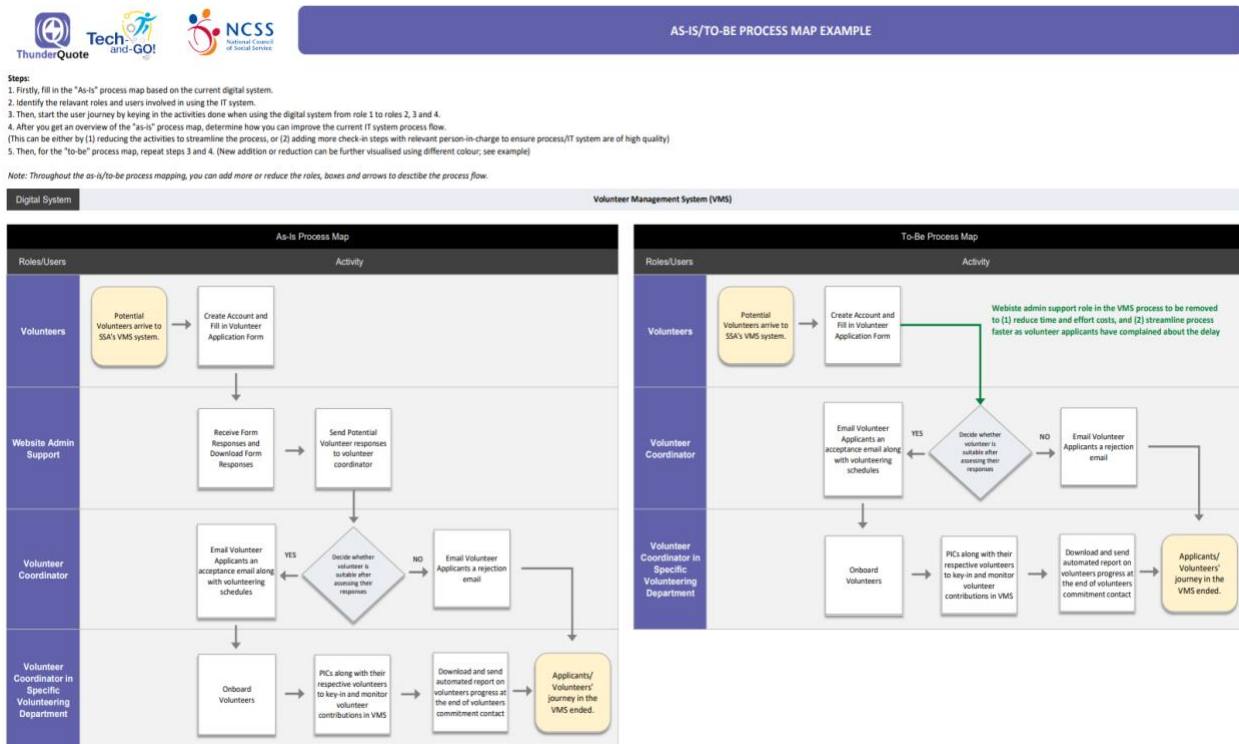
Figure 12: As-Is & To-Be Process Map Template (actual editable template available)

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Continuous Evaluation

Thorough analysis of the current systems and pain points using the 4 tools described above leads to clearly defined outputs and next steps that SSAs should take. We would therefore recommend that they compile their findings from the analysis section above and summarise the potential areas of improvement in the **TQ Areas of Improvement Analysis Template** below (Figure 13).

Figure 13: TQ Areas of Improvement Analysis Template (actual editable template available)

Scan the QR code to view or download this resource, or click here

Having already formulated ideal targeted improvement strategies and determined the priority levels of the various areas of improvement, SSAs should now have a clearer picture of the next steps that they may take to improve their current systems and processes throughout their digital implementation.

SSAs may choose to conduct After Action Reviews (AARs) after carrying out their process improvement strategies, as systematically conducting AARs with key players across the organisation is a highly effective method of driving change and building motivation amongst staff members. These AARs, if used, should be kept as simple as possible, with the goal of bringing team members together as a group to assess the effectiveness of a change project. Asking key questions shown in the **TQ After Action Review Template** (Figure 14) will allow the project team to identify their mistakes, reflect upon what they have learnt, and suggest new strategies for improvement both during their current implementation and for future digital implementation projects.

AFTER-ACTION-REVIEW (AAR) OF DIGITAL TECHNOLOGY PROJECT IMPLEMENTATION EXAMPLE

Steps:
1. Based on the agreed facts, fill in the blue (or top left) quadrant with the initial change management goal set earlier.
2. Then, proceed to the green (or top right) quadrant and list the actual results of project.
3. Compare the expected goals or outputs (top left quadrant) with the actual results of the change management project, evaluate whether there were differences, and identify potential reasons for the differenes and list in the bottom left quadrant.
4. Lastly, identify the (1) areas to maintain and (2) areas of improvements for future projects.

What were we expecting?
- improved staff productivity by ~20%
- remove departmental silos and establish collaborative working culture within the entire organisation

What actually happened?
- staff productivity improved by estimated 30%
- established collaborative working culture in 50% of relevant teams

Agreed Facts ← → Shared Opinions

Why was there a difference?
- the digital productivity solutions implemented were more effective than anticipated, resulting in a 10% better productivity rate
- difficulties in breaking departmental silos and changing company culture caused lower rates of collaboration than expected

What will we keep and improve next time?
- continue use of new productivity tools, and implement it in all departments of the organisation
- conduct staff training sessions to aid in coping with culture change
- provide rewards for teams and departments who cooperate in removing silos

Figure 14: TQ After-Action Review Template (actual editable template available)

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Pillar 3. Change Management Implementation

Change management, which involves managing the 'people side' of change, is a crucial element of any transformation project. This is because the inclusion of new digital tools and systems typically results in huge and significant shifts in individual staff members' workflows, which inevitably leads to change resistance as SSAs transition from their older systems to newer ones.

The final step in the overall 3-step process therefore aims to guide SSAs through this challenging process by helping them implement digital change management strategies to obtain buy-in from key stakeholders and drive change across their organisations.

Ensure Digital Project Implementation Success through Stakeholder Change Management Planning

SSAs should prioritise creating change management plans and strategies as early in the transformation process as possible to maximise the chances of their digital transformation efforts succeeding.

One of the first steps in the change management planning process is to identify the key stakeholders involved in the change project, as well as the stakeholders that will be impacted the most by the upcoming changes.

This is a helpful way to keep track of which of those stakeholder groups require high levels of support and training, and which are better equipped to handle the transformation. It also helps with the gauging of current staff sentiments and levels of buy-in across the organisation which may then be used as a foundation for stakeholder communication training and job redesign plans in the future.

The first step of the stakeholder analysis process is as follows:

(1) Identify key stakeholders
(2) Categorise each of these stakeholders / stakeholder groups according to the levels of influence they would have on the transformation efforts as well as the amounts of support that they would require
(3) Develop and prioritise a stakeholder engagement plan accordingly

The second step involves SSAs conducting a stakeholder analysis with the help of the **TQ Stakeholder Analysis template** (Figure 15) which will allow them to classify key stakeholders or stakeholder groups according to their respective levels of influence and support (as determined in the previous step) and prioritise these stakeholders according to their potential contributions and risks that they could potentially

bring to the project. SSAs may then use those pieces of information to come up with a suitable engagement strategy for each of these stakeholder groups.

Once that has been done, SSAs may use the **TQ Stakeholder Priority Matrix Template** (Figure 16) to indicate the levels of support that each stakeholder group, as defined previously, will need to receive throughout the system implementation (high or low) as well as the magnitude of the impact (high or low) that the implementation of the system will have on each of these groups. Additionally, the matrix uses these indices to classify stakeholders into 4 main categories:

Stakeholders to **Keep Satisfied**

Stakeholders to **Keep Close**

Stakeholders to **Keep an Eye On**

Stakeholders to **Keep Up-To-Date**

STAKEHOLDER ANALYSIS EXAMPLE

This worksheet is for you (a) to identify who are the stakeholders within your organisation or (b) to identify the stakeholders related to a change management issue.

How to use the worksheet:

1. Read the explanation of the terms below before doing the worksheet, then decide if you are using the worksheet for purpose of (a) or (b) (as mentioned above).
2. For (b), you would need to then decide the change management issue you are focusing. Eg. Implementation of new system.
3. After deciding your area of focus for this worksheet, write it down below.

Key Definitions in the Stakeholder Analysis Table:

Terms	Explanation
Influence	Influence refers to the degree to which a stakeholder or group will be impacted throughout the adoption of a system or during a change during different phases of the transformation (e.g., from the pre-system implemented phase to the system implemented phase), which would help that organisation identify user issues that might arise during the adoption or transition period. 'Low impact', for instance, means that a person has minimal issues with the adoption of the new system.
Support	Support refers to the level of guidance that a stakeholder requires throughout a change (e.g., High support means that the person needs a lot of guidance during the implementation/adoption of the system).
Potential Contributions	The unique actions or skills that the stakeholder can contribute to a project to facilitate or ensure its success.
Potential Risks	The potential threats that the stakeholder may bring to the table if sufficient buy-in/approval is not obtained.
Engagement Strategy	Possible methods of obtaining buy-in from the stakeholder and ensuring their support throughout the duration of the project.

Level Ranking Guidance Used in the Stakeholder Analysis Table:

Level of Influence	Explanation
High	This stakeholder has a significant influence (positive or negative) to the result of the plan.
Medium	This stakeholder has some influence (positive or negative) to the result of the plan
Low	This stakeholder has little to no influence (positive or negative) to the result of the plan

Level of Support	Explanation
High	This stakeholder requires significant guidance to learn the new implemented system
Medium	This stakeholder requires some guidance to learn the new implemented system.
Low	This stakeholder requires little to no guidance to learn the new implemented system

The focus of your Stakeholder Analysis: _____

Stakeholder	Influence	Support	Potential Contributions	Potential Risks	Engagement Strategy
Person A	High	Med	• Communicate with staff on change goals and strategy	• Sharing negative / false information	• Explain impact of change on organisation & success stories • Involved in change meetings
Person B	Low	Low	• Provide support and training to struggling staff	• Refusal to practice new processes	• 1:1 interview to address concerns • Develop action plan to build buy-in
Person C	Med	High	• Design training modules for user adoption	• Passive resistance	• Consistent updates on change progress • Assign to work closely with change team to increase involvement
Person D	Med	Low	• Gather change support from their department	• Slow uptake of new behaviors	• Provide custom training • Link up with Digital Captain to provide 1:1 support

Figure 15: TQ Stakeholder Analysis Template (actual editable template available)

Scan the QR code to view or download this resource, or click here

STAKEHOLDER PRIORITY MATRIX TEMPLATE

The Stakeholder Priority Matrix indicates the level of support that each group of stakeholders will need to receive throughout the system implementation (high or low), as well as the magnitude of the impact (high or low) that the implementation of this system will have on each of these groups. The matrix consists of 4 main categories of stakeholders.

Step: Fill in the matrix box based on the TQ Stakeholder Analysis you done prior.

Legend: (definitions for each quadrants are as below)

Q1 — Keep Satisfied:
This group of stakeholders must be comprehensively supported throughout the implementation of the new system since the success of the project depends largely on their buy-in and adoption of it. This can be done by providing resources, training programmes, one-to-one troubleshooting and support, as well as through open, two-way communication channels to give feedback and receive the necessary updates.

Q2 — Keep Close:
This group of stakeholders have a higher level of influence on the outcome of the project, while also requiring less amounts of support throughout its implementation, which is largely because they have minimal involvement in the digital solutions as end users. As such, they should be kept close and be informed of all developments but do not require large amounts of support with regards to the adoption of the system.

Q3 — Keep An Eye On:
This group of stakeholders are rated lower in the impact assessment as they are not as directly involved throughout the implementation of the system. However, they still require high levels of support to adopt and utilise the system. As such, leaders should keep an eye on this group of stakeholders to ensure they are coping well with the changes within the system, even though they do not need any specific form of close supervision since they are not as involved with the project as some of the other groups.

Q4 — Keep Up-to-Date:
This group of stakeholders only need to be kept up to date with the progress of the project, since they have low amounts of impact on the direction of the project and will not be directly involved once the system is implemented. As such, these stakeholders will only need to be informed on details of the stepwise implementation of the system throughout each of the project implementation phases and be kept up-to-date on the productivity impact of the newly implemented system through, for instance, emails or monthly meetings.

Figure 16: TQ Stakeholder Priority Matrix Template (actual editable template available)

Scan the QR code to view or download this resource, or click [here](#)

SSAs will then be able to clearly see (from Figure 16) which of these stakeholder groups should be engaged or prioritised first and communicate any changes made during the transformation accordingly.

Communicate Change

One of the most crucial factors in ensuring the success of an SSA's transformation project is for the organisation's management team to communicate the impacts of the change clearly to their employees. A lack of clear, impactful communication will cause employees to be left in the dark and confused by the changes taking place, which leads to frustration and an unwillingness to cooperate with the transformation. Creating a comprehensive communication plan is therefore critical to help SSAs avoid miscommunications and stay on track throughout their journeys of change.

An effective communication plan should inform relevant stakeholders of important progress updates and key change messages throughout the transformation. These key messages should outline the main goals of change, and the importance of achieving these organisational goals. It is also likely that the implementation of the new digital system will result in job reallocations and restructures, which makes it important for such communications to include descriptions of the redesigned and formalised job roles as well as the roles that each stakeholder group must play to ensure the success of the change initiative.

The **TQ Stakeholder Communication Plan template** (Figure 17) helps to facilitate communications as described above, and it consists of four key steps:

1) SSAs should first write or list the communication event or action that will take place, how often it will be conducted, along with the dates that it will be held on.

2) The leaders in charge of the event should also be clearly identified in order to create a sense of accountability and responsibility around the tasks to be completed.

3) These leaders of these SSAs should then identify their target audience, as doing so will help them craft messages specific to their audience's wants and needs.

4) They will then need to think about the main points that will be communicated to their audience and how to convey these messages in an effective manner.

Steps:

1. Firstly, write the communication event or action that will take place, followed by how often it will be conducted, along with the dates that have been confirmed thus far.
2. Then, they will need to think about the purpose of this event, and what they will be communicating to their audience.
3. It is also important to identify the audience of each event too, as that can help leaders to craft messages specific to the wants and needs of their audience.
4. Lastly, the leaders in charge of each event should be identified to build accountability and responsibility to get each task done.

Event / Action	Frequency	Confirmed Dates	Details	Leader In Charge

Initial change announcement	Once	18/01/21	Method: Company town hall meeting
			Audience: Entire SSA
			Purpose:
			• First company-wide announcement of proposed changes and impacted teams
			• Deliver key change story and messages, outlining goals, what is changing, positive impact, and intended future state of organisation
			• Explain process and next actions:
			   o Monthly group meetings and bi-weekly 1:1 meetings
			   o Formation of digital team to lead the change project
				CAB, Person F & G

Group meetings	Monthly	Every first Tuesday (starting 02/02/21)	Method: Small team meeting Audience: Department representatives (on rotation) Purpose: • Encourage dialogue on proposed changes • Address concerns and alleviate potential issues • Gather feedback and suggestions on departmental changes • Measure level of buy-in, and create strategies to increase it	Person G & K

Figure 17: TQ Stakeholder Communication Plan Template (actual editable template available)

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Alternatively, Job Redesign may Occur.

The Ecological Systems Theory states that each individual encounters different environments throughout their lives that influence their behaviour to various degrees. Adopting this theory in an organisational context implies that everything within an SSA's ecosystem exists in relation to multiple influences from other systems, processes, and people that it coexists with, which could potentially lead to complications that arise from new tech adoptions by users and the need for jobs to be redesigned.

TQ has therefore prepared two tools to help assess this need for job resign: One for staff self-assessment (Figure 18) and one that is to be used by the lead management teams of SSAs (Figure 19).

The **TQ Job Gap Evaluation Survey Sheet Template** (Figure 18) may be used by an SSA's staff members to evaluate the degree to which their current levels of digital competence correspond to the operational requirements of the newly implementation IT system. In a way, this exercise allows staff members to have a say in the organisational decisions made by their management teams.

JOB GAP EVALUATION SURVEY EXAMPLE

Step:
1. Based on the questions asked, you are required to answer the questions below based on your new job role as a result your organisation digital transformation project.

Organisation's Name: Organisation A

Current Role Title: Volunteer Coordinator Manager

Relevant System(s) you are currently helping to test, implement or manage: Volunteer Management System (VMS)

1. What are the new tasks and responsibilities that you will require to take on?

a.	Data input from previous volunteer database to new volunteer management system (VMS)
b.	Assigned quality control (QC) responsibilities to ensure volunteer coordinators are carrying out data input tasks correctly.
c.	Attend User Acceptance Tracking (UAT) or VMS trouble shoot meetings

2. What are the skills required to perform in your new role?

a.	Data entry
b.	Previous experience in using digital management systems

c. Strong understanding in navigating cloud-based systems

3. Which of these skills do you already have? Which do you require training for?

Skills Possessed	Skills To Be Acquired
Basic Excel and Data Entry	Data Management Skills
Able to lock Excel Sheets	Cybersecurity Skills
Data Entry	Data and Application Migration and Deployment

4. Rate your level of competency in the following skill areas:

Skill	Not competent at all	Semi-competent, but requires more training	Highly competent
Communication			/
Collaboration			/
Digital Literacy		/	
Problem Solving		/	
Taking Initiative			/
Time Management		/	
Leadership			/
Teamwork			/

Figure 18: TQ Job Gap Evaluation (actual editable template available)

Scan the QR code to view or download this resource, or click here

The SSA's lead management or Human Resource (HR) team can also conduct a gap analysis on the various job roles/positions that may be affected by the change using the **TQ Job Gap Analysis** (Figure 18) to come up with possible next steps to mitigate the impacts of these changes for staff members within the organisation.

Steps:

1. Based on your job role, list your skill/job scope requirements.
2. Then, further elaborate on your current capabilities in fulfilling the requirement.
3. Compare the capability gaps between skill/job scope requirements and current capabilities to fulfil the business requirements.

Job Role:	Admin Manager		

Skill / Job Scope Requirements	Current Capabilities	Gaps in Capabilities	Next Actions
Manage manpower allocation and shifts digitally	Manual shift management on Excel sheets	Lack of training to use new systems	Briefing & onboarding session to introduce new systems
Ability to troubleshoot user issues with new systems	Still using old systems & processes	Unable to troubleshoot due to unfamiliarity with new processes	Provide detailed user manual and troubleshoot guide
Provide support to team during digital transition period	Limited support capabilities	Lack of resources and appropriate support skills	Provide support resources and arrange skill-building training session

Figure 19: TQ Job Gap Analysis Template (actual editable template available)

Scan the QR code to view or download this resource, or click here

We would recommend that SSAs make use of both these tools to their fullest potentials as mutual agreements by staff members and management on new job allocations will increase the chances of staff buy-in and align the goals of both parties to facilitate the transition process.

Nevertheless, SSAs may find themselves having to recruit more staff members should they need additional manpower to fulfil the digital demands of the organisation (even after the reallocation of staff roles). To this end, they may use the **TQ Job Recruitment template** (Figure 20) to structure their process of talent acquisition.

RECRUITMENT PLAN EXAMPLE

Steps:
1. Firstly, identify the stages needed throughout the recruitment and the duration needed.
2. For each stage, define the tasks needed to be conducted, as well the person responsible (or leader in charge) and expected date of completion.

Stage	Tasks	Leader in Charge	Date of Completion
Recruitment Planning & Development (2 weeks)	• Review new job roles and update descriptions • Prepare recruitment materials (selection criteria, interview guidelines, etc.)	Person A	21/01/21
Candidate Search & Screening (6 weeks)	• Select job platforms / channels and advertise positions • Collect and review applications	Person C	14/02/21
Candidate Interviews & Selection (2 weeks)	• Shortlist candidates for interview • Schedule and conduct interviews • Conduct background and reference check • Make selection and extend job offer	Person D	04/04/21

Figure 20: TQ Job Recruitment Template (actual editable template available)

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Once the jobs have been redesigned or reallocated, SSAs should then provide comprehensive learning and development (L&D) trainings that focus on onboarding new staff members and upskilling current staff members in order to implement the new processes and tools as effectively as possible. This process can be simplified with the help of the **TQ Training Plan & Schedule template** (Figure 21) that lists the training modules to be completed by each affected team.

SSAs can refer to the job gap analysis worksheets (Figures 18 and 19) to decide on the content of or what to focus on during these training modules. Having such a training plan available will help the change management team monitor the progress of each group / staff member to determine if they have completed their respective trainings and to allow for additional trainings if necessary. Developing a comprehensive training plan beforehand allows SSAs to ensure that every group impacted by the change receives adequate training and support throughout each phase of the digital transformation. Having such a plan available is also helpful for ensuring that SSAs adhere to their schedules and follow through with their training modules.

TRAINING PLAN & SCHEDULE EXAMPLE

Steps

1. Decide on the training module(s) best to equipped your staffs (or team to be trained) with necessary skills needed to implement the new processes and tools as effectively as possible.
2. Ensure that each module has a specific team or staff to be trained as well as a respective trainer. The trainer can either be an employee within the organisation or can be outsourced externally.
3. Then, fill in start date and duration for the timeline for each training module to be implemented.
4. Should there be additional remarks, do note it at the column entitled comments.

Module	Start Date	Duration	Team / Staff to be Trained	Trainer	Comments
Accounting System Onboarding	22/01/21	2hrs	Admin Team	Person A	
Digital Transition Support Skill Building	25/01/21	2 sessions (2hrs each)	Admin & Volunteer Managers	External trainer	
Staff Management Skill Building	30/01/21	2 sessions (3hrs each)	Finance Manager	Person C	
Leadership Skill Building	05/02/21	3hrs	Assistant Managers	Person C	

Figure 21: TQ Training Plan & Schedule Template (actual editable template available)

Scan the QR code to view or download this resource, or click here

Finally, the **TQ Job Redesign Communication Template** (Figure 22) allows SSAs to successfully implement the newly redesigned job roles and job scopes in order to communicate any changes to their stakeholders. The template provides SSAs with the opportunity to design or come up with a strategic communication plan that lists all the changes and training announcements that will be made throughout the change. Developing such a plan beforehand allows SSAs to keep track of their communication and ensure that every impacted stakeholder group is kept well-informed.

JOB REDESIGN COMMUNICATION TEMPLATE

Steps:

1. Firstly, write the communication event or action that will take place, followed by how often it will be conducted, along with the dates that have been confirmed thus far.
2. Then, they will need to think about the purpose of this event, and what they will be communicating to their audience.
3. It is also important to identify the audience of each event too, as that can help leaders to craft messages specific to the wants and needs of their audience.
4. Lastly, the leaders in charge of each event should be identified to build accountability and responsibility to get each task done.

Event / Action	Frequency	Confirmed Dates	Purpose & Method	Leader In Charge

Initial change announcement	Once	18/01/21	**Method:** Company meeting
			Audience: Impacted teams
			Purpose:
			• First major announcement of proposed changes and impacted teams
			• Deliver key change story and messages, outlining goals, what is changing, positive impact, and intended future state of organisation
			• Explain process and next actions:
			   o Group briefings for each impacted department/division
			   o 1:1 briefings on updated job scopes with impacted employees
				CAB, Person F & G

1:1 meetings	Once per team leader	20/01/21	**Method:** Individual meeting **Audience:** Team leaders **Purpose:** • Brief of updated individual and team roles & responsibilities • Alleviate individual concerns and issues • Ascertain commitment and support levels • Evaluate emotions and ensure support is provided	Person G & K
Group briefings	Once per team	21/01/21	**Method:** Small team meeting **Audience:** Impacted teams (on rotation) **Purpose:** • Brief of new job roles, scopes, responsibilities, and team goals • Address concerns and alleviate potential issues • Gather feedback and suggestions on departmental changes	Person K
Training sessions	Monthly	1st session: 27/01/21	**Method:** Online video training **Audience:** Impacted teams (on rotation) **Purpose:** • Improve capabilities of affected teams • Provide individualised support for employees struggling to cope with changes • Ensure consistent practice of new behaviours and processes outside of training sessions	Person I

Figure 22: Job Redesign Communication Template (actual editable template available)

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Conclusion

This brings us to the end of the Digital Project Implementation User Guide. On a final note, we would like to reemphasise the importance of continuously adopting (1) project management, (2) process improvement and (3) change management best practices while keeping your organisation's systems and digital solutions updated, since new technologies are constantly being developed and updated over time. We recommend that you conduct an annual check and diagnosis of your organisation's digital systems to ensure that they are working optimally, are up-to-date, and continue to be the right fit for your SSA's daily operations.

We hope that you have found the various tools and systems provided in this document to be helpful and wish you all the best in your journey of digital transformation.

Get in touch to learn more!

tech-and-go@thunderquote.com

+65 6983 6001

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