Firm Strategy & Implementation Team

A successful change management initiative starts with the involvement of the right people. When building out the strategy & implementation team include individuals from various levels, departments, and locations as appropriate. Additionally, power users should be identified when implementing a new technology in the firm.

Please identify the following:

Project Manager - The firm's project manager plays a critical role in the success of the project whether the firm is implementing new technology, improving business processes, or undertaking another change effort. A project manager should have the following characteristics:

- Good communication skills
- Organized & task-oriented
- Respected
- Team player
- Change agent

Project Sponsor - Responsible for the overall success of the project and backing (including financial accountability). The project sponsor communicates the firm's vision and change management strategy.

Business Process Leads - Responsible for setting workflow procedures and enforcing the policy once the system is live. The business process leads are also responsible for approving changes to any firm established policies.

Innovation Lead - In charge of innovation for the firm and drives progress and growth in key areas. This person may also be the project sponsor or project manager.

Technology Lead - In charge of technology infrastructure for the firm. Main point of contact for end user support.

Identify key staff to act as power users during the initial rollout:

Power Users – When implementing new technology, power users are responsible for mastering skills and applying them to firm procedures. These individuals should be well versed with firm processes and should be experts in their functional areas. Power users should have the following characteristics:

- Show initiative, commitment, and leadership
- Able to answer questions on firm processes and procedures
- Ability to serve as the product champion for their office