

CASE STUDY

Autodesk reduces OCM reporting time by 91% with ChaMa



Executive summary

- WHO** Autodesk, the industry-leading innovator of software for architecture, engineering, construction, product design, manufacturing, media and entertainment, and other applications
- GOAL** Enable stakeholder-centric, holistic reporting of enterprise change initiatives
- CHALLENGE** The siloed nature of the various change initiatives and manual reporting processes made it challenging to present relevant data in one cohesive view for each stakeholder

SOLUTION

Applying advanced data analytics and automation via ChaMa, the cloud-based change management software, to quickly create, view, and modify change management reports

RESULT

Reduced report generation time by 91% and, and, more importantly, delivery of holistic stakeholder-centric views for more actionable insights and frictionless adoption



Situation

Like many organizations, Autodesk used a traditional approach to reporting on its transformation initiatives. At the ACMP Global Connect Conference 2022, Kimberly Svendsen, Senior Change Manager at Autodesk, [presented the success her team had with introducing automation and scalability into their change management model](#). Here's how she described the way they used to generate organizational change management reports, before they made this change.

- The goal was to provide a weekly report.
- The data was gathered into a spreadsheet – what Kimberly calls a flat file, due to its two-dimensional nature. While it contained a lot of valuable information for change leaders, with its hundreds of rows of data and thousands of cells, it was not in a format that could be presented to business leaders.
- Kimberly's team would spend a lot of time sorting, categorizing, and recalculating the data to roll it up into numbers and figures that could tell a clearer story.
- The “data story” was then portrayed graphically and transferred into a slide presentation.
- The slide presentation reported data through two viewpoints: a summary view, which gave an overall project count, and another view that presented a sub-project view with an additional level of detail.
- Each report took six to eight hours per week to generate, because of the manual manipulation involved. This added up to 65 days over an 18-month program life cycle devoted entirely to generating these two-slide reports.
- If someone wanted to see a different layer of detail or see the report from a different angle, it had to be generated manually, which could take another six to eight hours per request, per report.
- And this was just for one change initiative!

Challenge

It's easy to perceive the challenges inherent in traditional reporting methods like this one.

- The existing reports provided a limited amount of high-level information to enterprise leaders and other key stakeholders.
- Given the siloed nature of change initiatives, the reporting process was manual and resulted in each initiative being reported on separately.
- Each stakeholder got the same report, no matter what their role was or what information they were actually interested in; relevant data was not presented in one cohesive view that would reflect the relevance and benefits to each stakeholder.
- The insights provided in the reports presented a challenge for data-driven decision making.

“*What the PMO wants to know versus the leaders, versus that end user sitting in the chair who's going to have to be doing something differently – I needed to be able to provide a different level of information, but make it meaningful and relevant for each one.*”

—
Kimberly Svendsen,
Senior Change Manager,
Autodesk

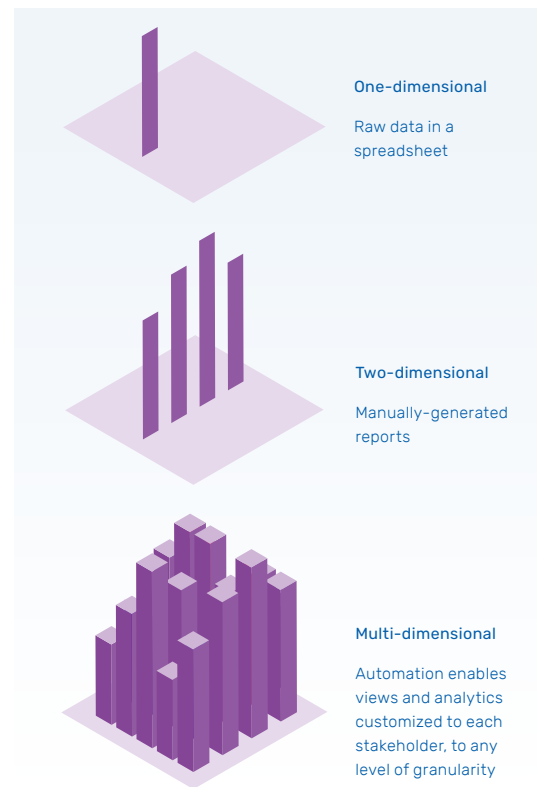


Solution

To make their change management model scalable and able to provide more actionable insights to stakeholders at each level of their organization, Kimberly Svendsen's team at Autodesk's Finance Change Management Office aligned the change management life cycle with the project life cycle and introduced enabling technology. Following are the specific steps they took to achieve this.

1. They implemented [ChaMa, iTalent Digital's change management software](#), which allowed them to automate data analytics and generate custom reports.
2. They picked a program to start with based on how much control the change management team had over the collection of change impact information from the beginning of the program.
3. They determined what was changing, as well as who would be impacted and by how much. They then defined the information each stakeholder at each level needed. The main question each enterprise leader asks is, What does this change mean for me and my team, specifically?
4. They gathered and shared change management insights throughout the project life cycle, as illustrated in the table below.

5. Using ChaMa, reporting has gone from two-dimensional to multi-dimensional, because it allows them to pull up the analytics and insights that are most relevant and meaningful for each type of stakeholder. They are no longer confined to a flat spreadsheet or a two-page report with limited detail. Advanced analytics and automation allow them to go as deep as they want into the data, and to look at it from any angle.



PROJECT LIFE CYCLE	Intake	Planning	Initiation	Execution	Closing
	A business case for a project aligned to corporate strategy / strategic themes is developed, submitted and reviewed.	Scenario planning is conducted to prioritize projects considering strategic alignment, architecture needs, financial and resource constraints	Project is approved and budgets are committed. Project managers are assigned, and project execution begins.	Status reports, financials, risks / issues and change management activities are reviewed at regular intervals.	Projects are transitioned to run the business (RTB). Project outcomes are documented and compared to the business case to determine realized value.
OCM REPORTS	+	+	+	+	
	Change Landscape (CMA) and stakeholder impact level Ongoing change saturation impact	Change Risk Landscape (CRA) Change risks	Change saturation Change deliverable status Change roadmap	Transition plan Key learnings Change / ROI metrics	

6. Through the course of this initial project, a repository of stakeholder intelligence was created that can be leveraged in future projects. As the tool is used for more projects, it can begin to make intelligent suggestions about the best methods and timing for communicating with different stakeholders based on the broader body of data and outcomes.

Data insights from the change deliverables are used to make better decisions and orchestrate change more effectively.

Results

Organizational change management report generation shrank from 5-7 days to 30 min, representing a time savings of 91%, in addition to the hard cost savings from not needing as much support from paid consultants or contract workers to put the reports together. They can spend that recuperated time on value-added relationship-building with stakeholders rather than number-crunching.

More importantly, the quality of the dialogue with enterprise leaders and program stakeholders dramatically improved alongside an increase in adoption enthusiasm. Autodesk's Finance CMO team typically only gets to meet with the business leaders for about a half an hour at a time. So, that time needs to be used optimally. When they began to show stakeholders graphically and concretely what change impacts were affecting their team and what they needed to do, their inclination to take the action necessary skyrocketed. "It just really shifts the dialogue," said Kimberly Svendsen.

“ *When we do that big flip [to the stakeholder view] and say, 'Wow, we've got 20 projects that are enterprise-wide across different groups, and they're all impacting the same five user groups at the same time,' that is empowering from a decision-making perspective.* **”**

—

Kimberly Svendsen,
Senior Change Manager,
Autodesk



About iTalent Digital

iTalent Digital is a global woman- and minority-owned software engineering and full-service tech consulting company headquartered in Silicon Valley that champions the people side of tech. We challenge the status quo and help companies achieve exceptional business outcomes through a suite of digital transformation services such as enterprise community, personalization and unified search, data transformation and business intelligence, SaaS solutions, and enterprise change management.

Our change management model, delivered by expert consultants and fueled by our intelligent change platform, ChaMa™, drives change agility and enables you to realize your business vision and desired outcomes with sustained adoption.



Contact: chama@italentdigital.com | www.italentdigital.com

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