



Introductory Sessions – Branch Town Hall

15th December 2020

Project and Change Framework

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Who we are

Hart Square

Our team

Who are Hart Square?

HartSquare

We are *specialist CRM and technology consultants*

In a nutshell, we provide independent consultancy services to help you with your CRM and technology challenges and advise on how to make your systems work smarter for you.

Focusing purely on the non-profit sector, our clients include unions, professional membership bodies, trade associations, charities, voluntary organisations, healthcare and education bodies.

www.hartsquare.co.uk

HartSquare

Our Team



Matt Dunphy

Senior Business
Change Consultant

Fórsa's Change
Manager



Chris Gilbert

Head of Technology
and Services

Fórsa's Project
Sponsor



Allen Reid

Director of Client
Services

Fórsa's Account
Director



Ian McGregor

Business Change
Consultant

Fórsa's dedicated
Project Manager for
Partner Selection

Why we are here

Project mission and vision

The benefits the project will bring

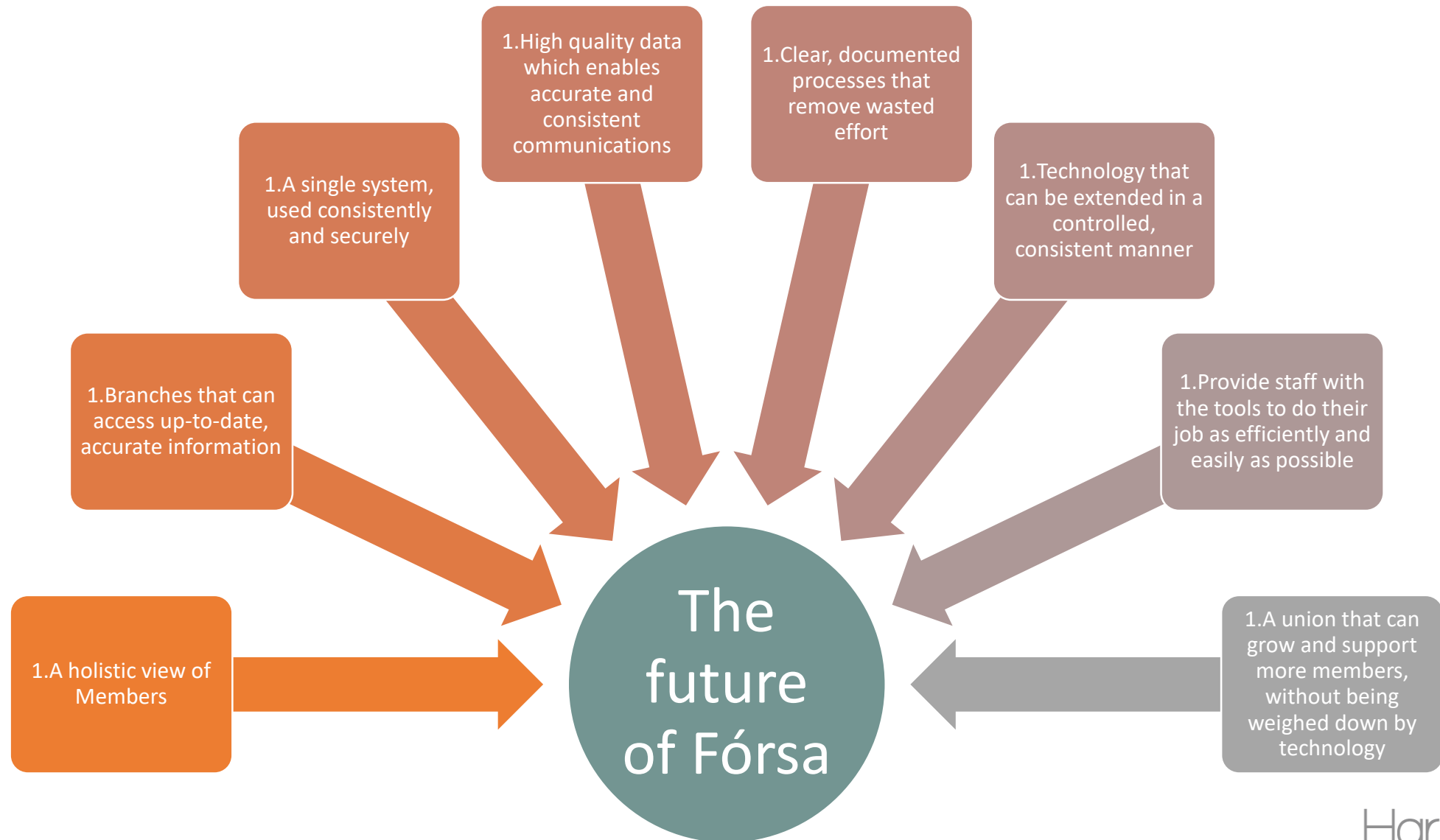
Our work with Fórsa to date

To help Fórsa select and implement a
single, streamlined standardised
membership system in 2021

This is in keeping with Fórsa's own strategic vision, to be -

- ⑩ A union where members feel valued
- ⑩ A union where activists feel empowered
- ⑩ A union where staff feel heard and involved

The benefits



Our work with Fórsa to date



Spring 2020 – The business case for change



Summer 2020 – Planning and initial preparations

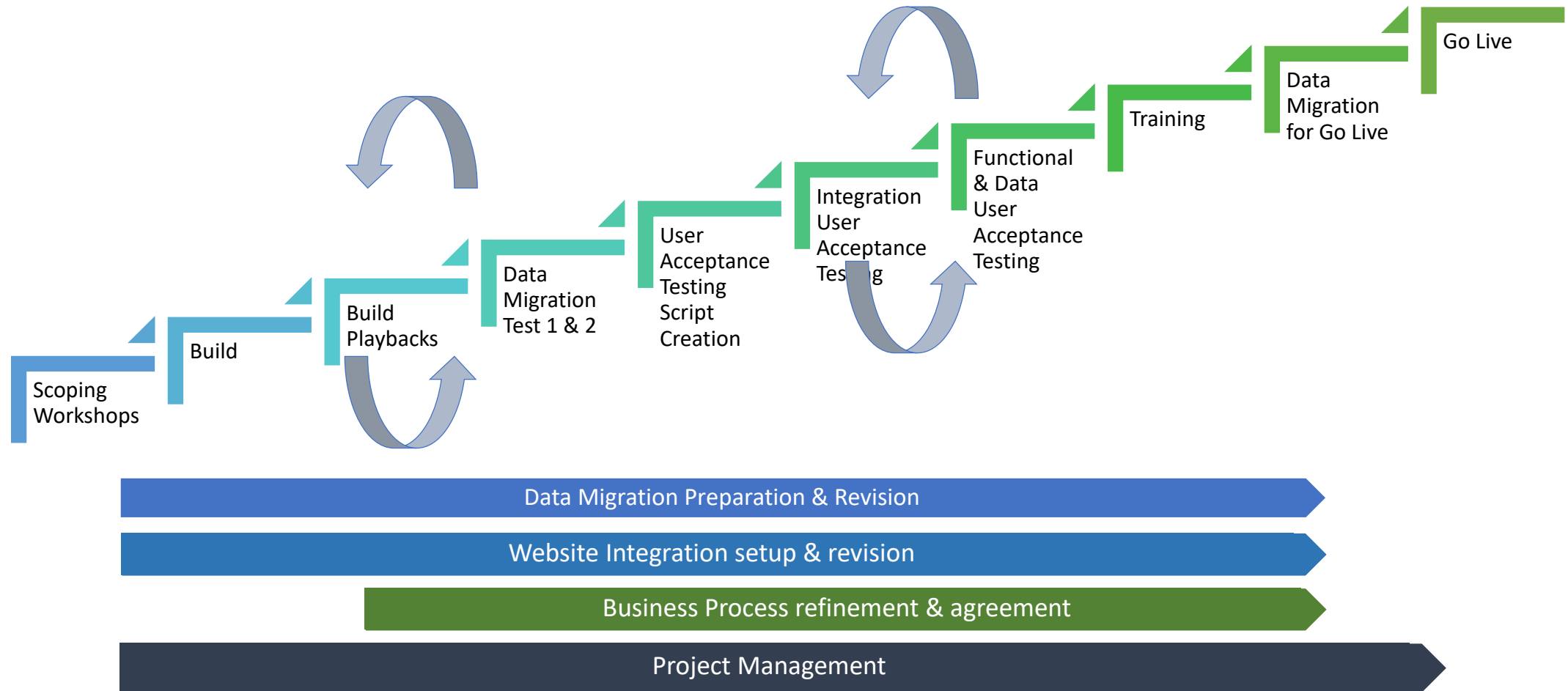


Autumn/Winter 2020 – More preparation and technology selection Project



Jan 2021 – The implementation project begins

The nuts & bolts of implementations



By January, Fórsa will have selected a technology partner for the implementation, and we will have set the project up together so it can begin successfully

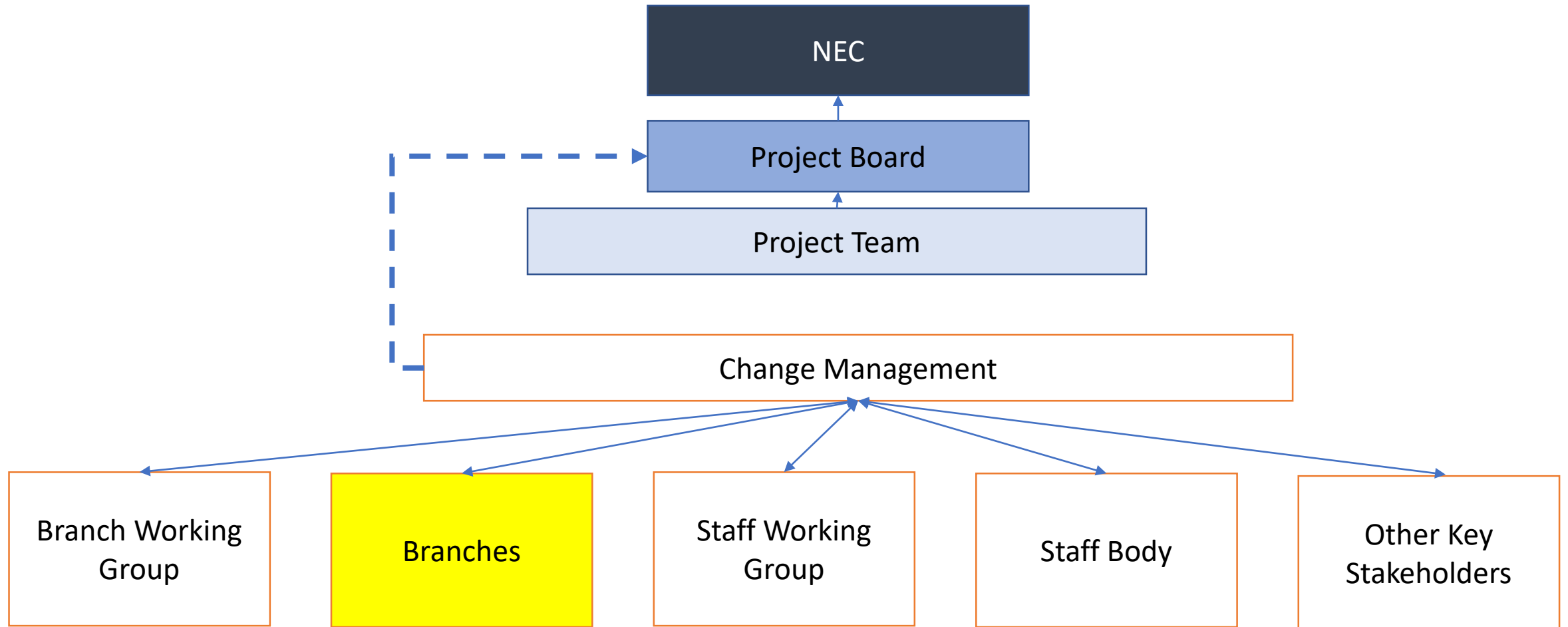
Why you are here

The change network

Your role

Expected time required

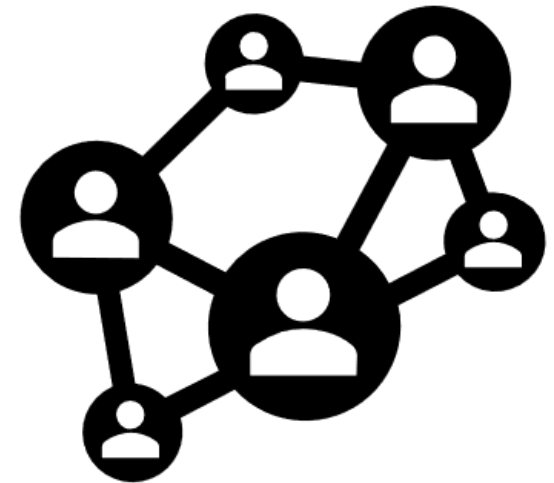
Fórsa's change network



The role of the Fórsa Branch Working Group

To be –

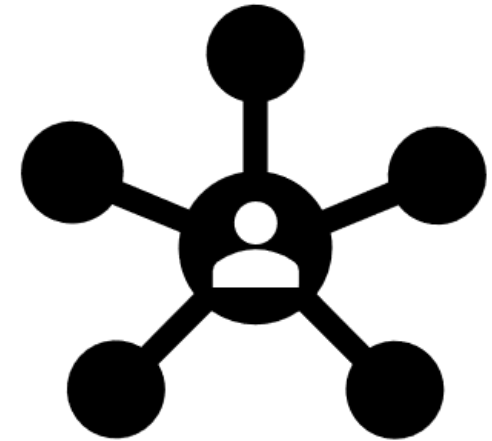
- ❖ Ambassadors for the project and the changes it will bring
- ❖ A point of information between the Project Team and Branches
- ❖ A participant in project activity at key stages
- ❖ A source of feedback on how the change is going, suggestions for improvement



The role of Branches

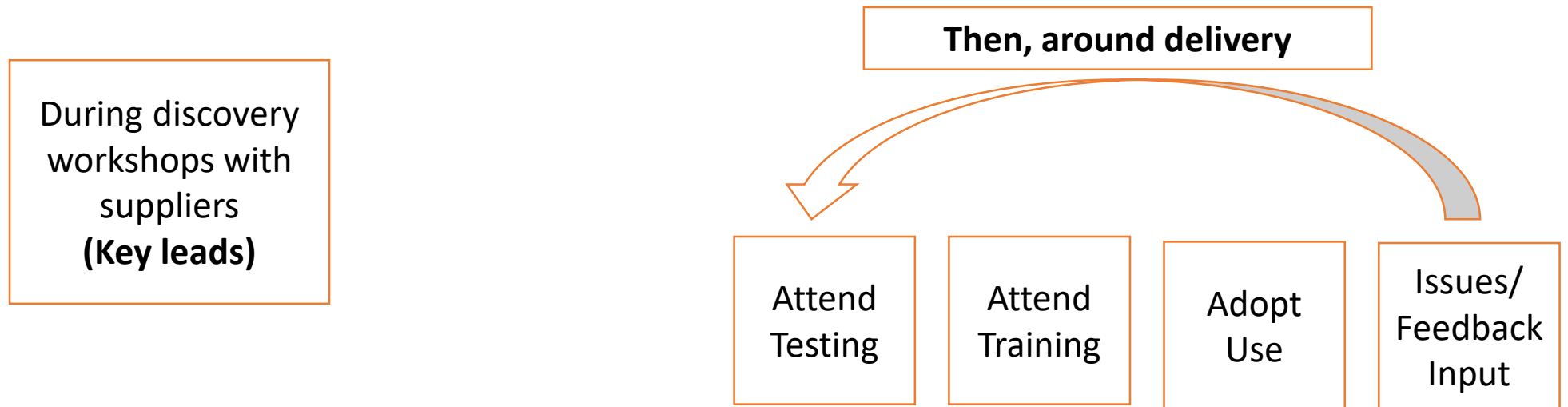
To be –

- ❖ Proactive in communication with the Working Group and Fórsa during the project
- ❖ Nominate participants in any required workshops, testing or training events
- ❖ Available to share key information required which helps the project's data leads
- ❖ Open in any feedback on concerns and suggestions about the changes next year



Expected time required – All Branches

Branch time required



Ongoing updates from champions and management, lighter involvement in process improvement and design

What's ahead

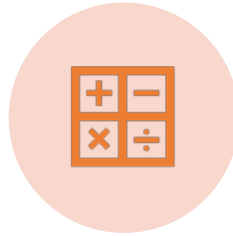
Understanding change

Project Headlines

Common change barriers



Understanding of the
change being
undertaken



Negativity,
resistance



A failure to fully involve
those with a stake in the
change



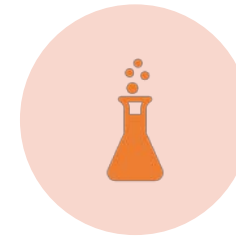
Poor, inadequate
communication



Lack of resources and
commitment to the
change



External pressures – e.g.
changes in government,
changes in priorities

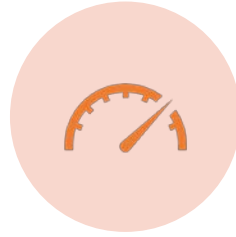


Negative past
experiences of change

Positive drivers for the Fórsa change



There is a desire for change



There is a sense of urgency about 2021



Technology change fits the wider Fórsa strategic plan



There is a drive for long term new ways of working



There has been firm approval and support for the business case



Change management is understood and has been planned



The Branches will be actively involved.

Key messages



This is one of many key changes being made by Fórsa



Lots of aspects of Fórsa working will not change



This is must do change in 2021



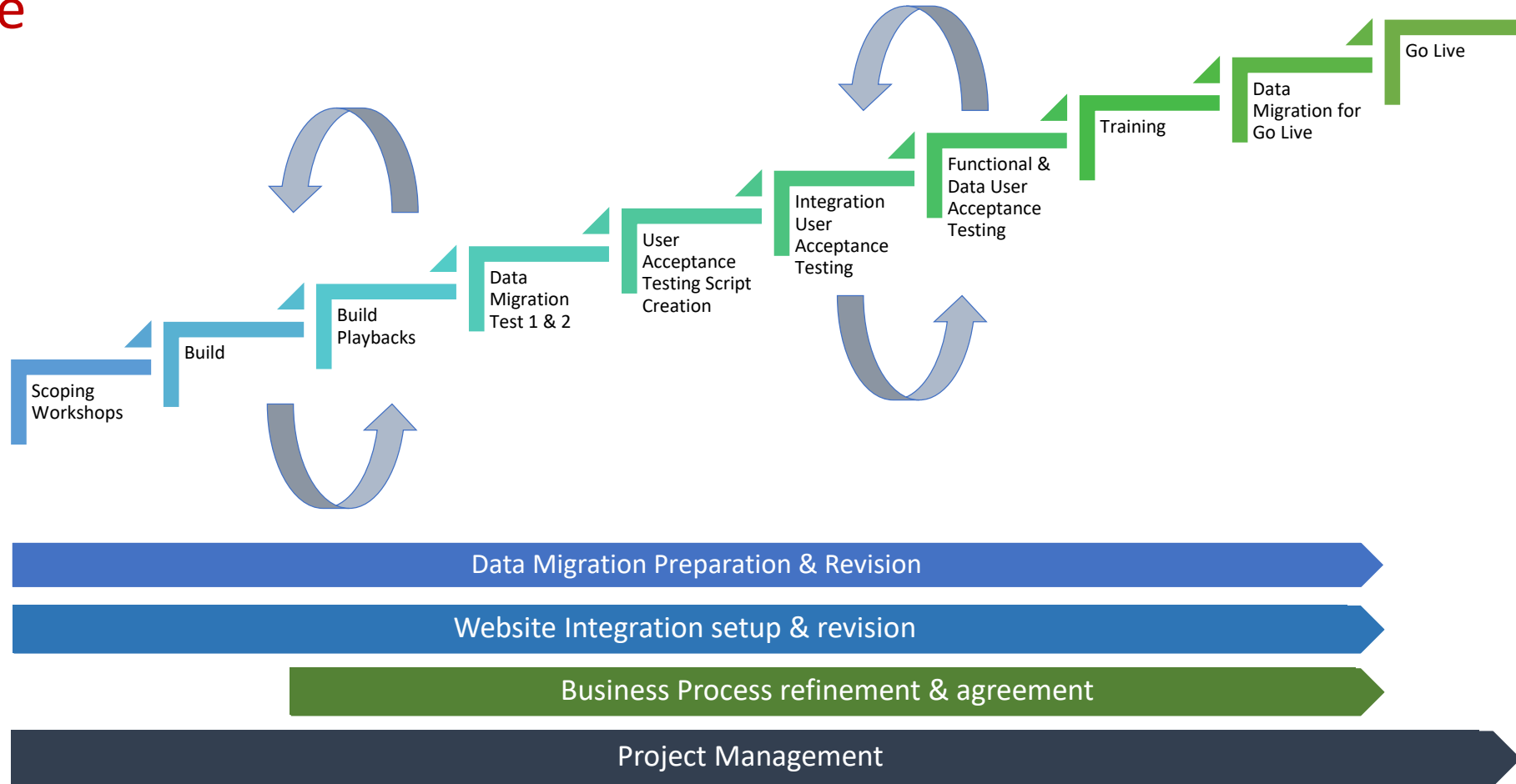
We need your help. The support and involvement of Branches is essential to the project success (particularly at design and testing phases)



New technology will be different, we will help with that change above all

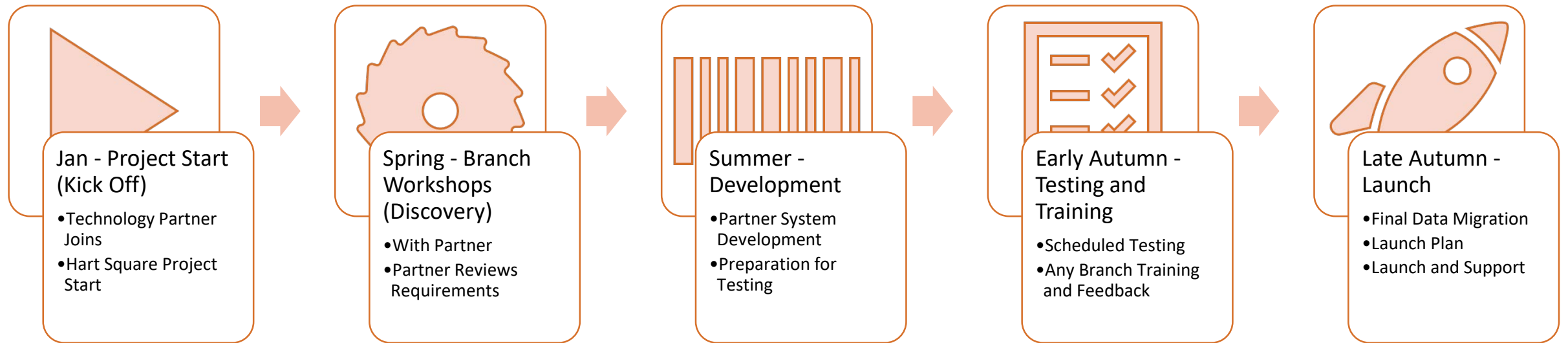
The nuts & bolts of a system implementation

The example



Fórsa's system implementation

Simple View



2020

2021

Sep

Oct

Nov

Dec

Jan

Feb

Mar

Apr

May

Jun

Jul

Aug

Sep

Oct

Nov

Dec

Entire programme of work

Main project, workstreams

Require
ments*

Partner selected

*Incl join online

End of current
project

CRM, portal Live

Partner
Selection

CRM , portal implementation

Data, content
planning

Data Migration work stream

Project
closure

Portal Content TBC

Benefits Plan

Benefits measurement

Supportive work streams

Business Process
Review

Business Process Improvement and Re-Design (To-Be)

Change Mgmt.,
Comms Planning

Change Management, Communications Plan Delivery

Project Scope,
Documentation

Project Management, Governance

Project
Governance setup

Questions and Next Steps

Branch – Key Next Steps

1. Branch data survey

2. All – main meeting schedules

3. All – confirmation of technology partner

4. All - Project Kick Off update