



## The Product

The ultimate success of organizational change initiatives depends heavily on the way the organization approaches that change. A well-positioned organization has clearly defined related goals and initiatives; understands the dependencies and success enablers of the change; is organized and resourced to achieve objectives; and is confident in its ability to successfully transform. Fulcrum Methods **Organizational Change Management (OCM 2007)** methodology is a recognized toolset for building the management process and discipline around transformational change. Use **OCM 2007** to lay the foundation for:

- Building confidence in organization management and objectives
- Enhancing organizational core competencies, collaboration and communication
- Creating processes for continuous change management across and within the organization
- Ensuring management involvement and availability to support organizational initiatives
- Assessing and managing risk across the organization
- Developing an organizational 'Master Plan' that maximizes the potential for current and future success and business value

## The People

"The experienced Fulcrum Methods team has developed a process that includes both analytical rigor and executive team involvement, and it significantly helped our leadership team grow."

**Norm Gruber, President and CEO  
Salem Hospital Regional Health Services**

## The Power

- Align strategic initiatives with capabilities, core competencies and availability
- Build organizational confidence with and across senior management team
- Enhance collaboration, communication and decision-making across senior management team
- Determine desired outcomes and success methods/metrics before initiatives/projects are launched
- Establish accountabilities throughout organization
- Serve as a basis for ongoing review, monitoring and adjustment

## The Value

- Increased confidence in management team
- Improved prioritization of strategic initiatives.
- Better overall decision making and communication
- Improved alignment of incentives across the organization
- Increased capacity of staff and physicians/clinicians to accept change
- Continued education with Fulcrum Methods Certification
- Flexible licensing structure scalable to your requirements

## The Solution: OCM 2007

### Work Plan

- Organizational/governance models
- Analyze/document organization current state
- Identify/design/document future state
- Ensure activities meet strategic and business goals
- Identify opportunities for improvement
- Prioritize activities across the organization
- Identify resource requirements and constraints
- Assess initiative and organizational risk
- Develop budget and return expectations
- Identify major issues, precedents, linkages and sufficient conditions for success
- Define/produce/implement the Master Plan
- Assess the outcomes

### Guidebook Overview

- Planning and Initiating
- "Framework for Success"
- Data Collection
- Analyze, Synthesize and Simulate Data
- Develop OCM Master Plan
- Post-Implementation Measurement

### Standard Deliverables

- Initial Interview Questionnaire
- Interview Scoring Template
- Network Diagram
- Initiative Scorecard
- Initiative Scoring Template
- Resource Planning Template
- Initiative Portfolio Quadrant Diagram
- Core Competency Influence Diagram
- OCM Master Plan Template

## Learn More:

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