OCM (Org. Change Management) White Paper - Role Mapping

Summary

This OCM white paper has been written to assist clients in better understanding the Role Mapping process in an SAP deployment. The white paper defines Role Mapping and speaks to the logical build that is required in order to ensure that the project process teams output is properly transferred to the business, at an End User level, and supported by the organization.

Role Mapping results are critical as they will be the basis for the training curriculum and the security profiles. They will also be the foundation for the HR position descriptions impacted by the SAP project.

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Author Bio


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John also has an extensive international business background, including 16 years in both Business and Sales Management positions.

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Role Mapping Skills, Objectives, and Purpose

Most ERP implementations significantly change the skills and behaviours of individuals who use the system, even those who are indirectly affected. Typical impacts for users in an implementation include:

- Changes to roles and responsibilities due to redesigned business processes
- Changing nature of relationships with other departments or business units
- "Right first time" attitude required for data entry due to the integration between business departments
- New skills, not only in SAP but in general computer literacy

Understanding who our users are and what they need to do is therefore a critical aspect of the Program

The Role Mapping approach described in this document is targeted to achieve the following objectives:

- The integration of the "top down" and "bottom up" organization design work completed by the SAP Project teams. This approach will guide teams through the process of linking structural concepts and organization principles with the roles defined through the scripting process.
- The alignment and leveraging of key objectives of the various Teams.
- The need for OCM to understand current organization structures, including roles and responsibilities. OCM will facilitate 'Role Mapping Confirmation Sessions' in which the Role Mapping deliverables will be used to present changes to the direct Supervisors of the future End Users.
- The need for the Training Team to understand the roles and responsibilities of different positions in order to build effective training curriculums.
- The need for Security to understand position profiles necessary to configure system security and complete documentation of business control techniques.

This document represents the collective requirements of the four groups (Process Teams, Training, Security & OCM) related to Organization Design and provides an approach that leverages work whenever possible across the needs of these Groups.

Purpose of the Role Mapping Workshops:

- **Map Transactions to Activities:** Ensuring that the Leads have all transactions listed (both SAP & Non-SAP). Also see that the Activities in your process flows are properly worded for End User purposes and that they truly describe the activity. In this session, the Transactions feeding Activities will be the basis for the creation of Roles.
- **Map Activities to Roles:** Do a further gap analysis of Activities and create Roles that are consistent with the description given later in this presentation. Roles are the critical clustering of Activities and they will be mapped to Positions.

- **Map Roles to Positions:** Verify “Role” proposals and map to Positions at all sites. These Positions will eventually be mapped to individuals.
  - Make sure that back-up positions are considered & create Roles for ‘Error Handling’.
  - Identify necessary organizational changes resulting from newly defined “Roles”
  - Confirm Mapping with the Supervisors of End Users in the “Role Confirmation Sessions”.

Role Mapping Steps, Responsibilities, and Deliverables

Role Mapping defines the responsibilities related to the new Business Process:

Purpose:

The purpose of this role mapping approach is to provide the client with a repeatable process for mapping SAP roles (e.g. job roles, security roles, training roles and HR roles). These will focus on the following areas:

- Provides the Project Teams with guidance on ‘Role’ development
- Provides Training with a framework for curriculum development
- Is the basis for Security
- Provides for consistent process responsibility across locations and businesses
- Basis for End User Readiness – Role Mapping Confirmation Session developed to work with Supervisors regarding roles to be mapped to their direct reports and advising them of associated SAP training required.
- Review role mapping tools and processes currently used by the client
- Reviewing role mapping approaches that the client has started to execute and recommend actions to leverage and build upon current activities.
- Provide best practices in the Role Mapping process
- Benchmark other SAP customers to provide insights on risk mitigation and identify success factors
- Determine the process for working collaboratively on the Role Mapping process with the security team, training team, and business community

Deliverables:

The OCM Consultant will deliver a formal document to the client. This document will contain:

A ***Role Mapping Strategy*** that summarizes the client’s process for Role Mapping. This process will be based on collaborative efforts with the client. The consultant agrees to share best practices and leverage current client activities to determine a repeatable process for Role Mapping in all SAP projects going forward (If that is appropriate).

Role Mapping Phases

The timing of the Role Mapping activities is established at a high level during the Blueprint Phase. These approximate dates and activities can be captured during the Stakeholder Roadmap session.

In the Realization Phase, the process teams (led by the Team Leads and facilitated by OCM) do the following:

1.) Review the Process Flows and ensure that the names used for the Activities in the Flows make sense and that they will be understood by the business. Often this is not the case, because the Flows were made around Blueprint or earlier, when perhaps the client did not understand the purpose of Role Mapping. Team Leads should ensure that they have all of their integration points (to and from the flow) included in their flows. These often are indicated by yellow “side-way” triangles, which include Flow names & numbers.

2.) The SAP/Consultant Leads take ownership of the Transactions to Activities exercise. OCM should facilitate pre-mapping meetings with the Leads so that they understand their jobs throughout these sessions.

3.) Then the client lead takes ownership of the 'Activities to Roles' session. Be careful that the Roles are not so large that they can be broken apart when you present them to different sites. It is better to keep the Roles smaller, when in doubt.

4.) The Client Leads also own the ‘Roles to Position’ Session.

* It is interesting that at first many people cannot understand the difference between the ‘Transaction to Activities’ exercise and the ‘Activities to Roles’ exercise. The OCM facilitator needs to have the teams start working on examples from the flow for them to fully understand it.

* Of course none of this will work unless the OCM facilitator convinces the Client Lead (and the SAP/Consultant Lead) that this is important. Always establish the importance at the beginning of the project, usually while doing the Stakeholder Roadmap at the beginning of Blueprint, or earlier.

* The other mistake that is often made is that the clients do not allow for enough resources and time to map the non-SAP activities for other systems or changes to manual jobs. These too should be included in the Roles to Position sessions.

Of course OCM facilitates all of these sessions.

The Three Role Mapping Workshop Steps

- Transactions to Activities - Steps:

  - *SAP Leads will quickly talk through each process flow, including Master Data, (The Master Data team will also be invited to these sessions) within their process. The teams should review one flow at a time looking at each Activity.*
  - *Client Leads will then lead a gap analysis of the Activities, with support from the SAP Leads (Should there be more, or a reduced amount of Activities in the process flows and should the names be changed to reflect the actual work?)*
  - *Leads will ensure that all transactions for their area are listed before the session (SAP Leads for SAP Transactions & Client Leads for Non-SAP Activities)*
  - *SAP Leads will then lead the mapping of SAP transactions to each SAP Activity within each flow.*
  - *The Client Leads will then lead the mapping of Non-SAP transactions to each Non SAP Activity within each flow (Ensure that all Non SAP transactions and Activities are covered).*
  - *Leads will ensure that all SAP & Non SAP 'Transactions to Activities' are entered into the matrix in Solution Manager.*

** The first deliverable is the Transactions to Activities matrix. The Activities part of this equation refers to the Activities in the process flows. If the Activities in the flows are not properly named, they should be changed. If the appropriate Activity is not there, it should be added and if there are Activities in the flows that are not appropriate, then they should be deleted.*

Transactions to Activities should be either a one-to one relationship or one to many.

The process flows need to reflect any changes made to the Activities (added/changed/deleted).

This is because the flows and their Activities will be the basis to the building of the Roles.

- Activities to Roles - Steps:

  - *<u>Client Leads</u> will quickly talk through each process flow (including Master Data) within their process. One Flow at a time looking at each Activity (With support from the <u>SAP Leads</u>)*
  - *<u>Client Leads</u> will then review the gap analysis of the Activities (completed in the Transactions to Activities session), with support from the <u>SAP Leads</u> (Should there be more, or a reduced amount of Activities and should the names be changed etc?)*
  - *The teams will cluster Activities to create appropriate "pieces of work" that will be mapped to positions. Roles will be "verb" driven. An example of a Role would be "Enter an Order".*

- Roles to Positions - Steps:

  - *<u>Client Leads</u> will review the Organizations impacted by the change at the various client locations (Client Leads please bring the latest organization charts).*
  - *<u>Client Leads</u> will then walk through each Role, describe it and discuss & decide which position/s they will be mapped to.*
  - *<u>Client Leads</u> ensure that all mapping is included in the 'Roles to Position' matrix.*
  - *<u>Client Leads</u> will make sure that all follow-up actions items are completed.*

- *Client Leads will ensure that any changes made (i.e. changes to Roles etc) are consistently changed throughout the process.*
- *SAP Leads may not attend this portion of the sessions; but, they are to support the Client Leads throughout the process by supplying information for SAP related Roles/Activities/Transactions, when required.*

The Challenge Session

After these steps have been taken, there should be a **Challenge Session**. In this session the OCM Lead facilitates and the Process Leads present the Final version of the process flows and Roles to Position matrix. This session should include the other Process Leads, as well as the V.P. level heads of this process (Process Owners).

The Challenge session identifies gaps and items that belong in other processes etc. It also gives complete ownership to the Process Owners.

The Supervisor Workshops

Later, before training begins, the Process teams need to conduct Supervisor Workshops. This is when Process Team members present the 'Roles to Positions' and the 'Change Impact' document (gap analysis of the current state versus future state) to the supervisors of the End Users. The OCM representative will facilitate this session.

In this session, the Supervisor accepts ownership of this process. The Roles are explained by the process team member and it is strongly suggested that the KPI's (Key Performance Indicators) attached to these Roles be used as the basis for the annual assessments for their employees.

Supervisors are asked to inform their employees of the new roles and to ensure that the employees attend the training, informing them that it is mandatory.

Supervisors will also advise the End Users as to how they can best get assistance throughout Go-Live.

Conclusion

In conclusion, it is critical that all of these OCM deliverables are owned by the Process Team Lead and not the OCM team or representative. The reason for this is because when the project gets extremely busy, the Process Team Leads will inevitably argue that they are too busy with the technical side of the project and that they do not have time for these deliverables. Making them responsible for these deliverables within the overall project plan, ensures that these important OCM sessions will take place and be successful.

* I would like to thank both CLG (Continuous Learning Center) and Bayer Corporation for some of the terms and the basis for this methodology

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