

# Steps to get your credit union team ready for PaaS

There are five phases your credit union will progress through as you transition to the IBM Payments Canada Centre (IPCC) Payments as a Service (PaaS) model. It is recommended each credit union identify an organizational change management team within your project that will help across all phases to achieve the outcome of a committed organization that will sustain PPI once the project has ended. Credit unions will be consulted throughout this process.



Unaware	Understanding	Acceptance	Commitment	Sustainment
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<p><b>THINGSTODO:</b></p> <ul style="list-style-type: none"> <li>Interview project manager and project sponsor to confirm scope, objectives, timeline, and complete change description document and conduct a governance assessment (RACI matrix)</li> <li>Create approach to assess impacts by stakeholder groups</li> <li>Complete the change impacts assessment</li> <li>Confirm key stakeholder names, functional testers, and any signatories for outages</li> <li>Create change management plan and tactical plans for stakeholder engagement, change network, internal communications, and training.</li> <li>Meet with operations support to advise them of the coming release, its impacts, and what they will need to do to support it</li> <li>Build materials to support the project manager</li> <li>Meet with IT operations and release management to coordinate broader communications to credit union staff (i.e. announcement protocols and dates)</li> </ul>	<p><b>THINGSTODO:</b></p> <ul style="list-style-type: none"> <li>Finalize OCM plan materials by audience (stakeholder engagement, change network, communications, training, and resistance management materials)</li> <li>Coordinate training materials for functional testing by working with project manager and project team to assign responsibilities</li> <li>Track UAT training attendance</li> <li>Confirm IT operations and release management have received knowledge on impacts of outages</li> </ul>	<p><b>THINGSTODO:</b></p> <ul style="list-style-type: none"> <li>Execute OCM materials (stakeholder engagement, change network, communications, training)</li> <li>Monitor and analyze OCM effectiveness: e.g. attendance of training, feedback from business readiness surveys, questions from coaches.</li> <li>Recommended OCM activities to be added to OCM plan (stakeholder engagement, change network, communications, training)</li> <li>Conduct modifications as required</li> </ul>	<p><b>THINGSTODO:</b></p> <ul style="list-style-type: none"> <li>Attend daily integrated reporting on break/fix issues</li> <li>Determine necessary key messages and OCM activities to mitigate the issues for those impacted (stakeholder engagement, change network, communications, training, and resistance management)</li> <li>Conduct lessons learned session</li> <li>Make recommendations for next steps to build upon the solution and sustain it</li> </ul>
<p><b>DELIVERABLES:</b></p> <ul style="list-style-type: none"> <li>Complete change description document</li> <li>RACI matrix</li> <li>Change impact assessment workshop</li> <li>Change Impact Assessment</li> <li>Approach to organizational change management</li> <li>Organizational change management approach and plan</li> </ul>	<p><b>DELIVERABLES:</b></p> <ul style="list-style-type: none"> <li>Stakeholder list</li> <li>Case for change presentation</li> <li>Kick off presentation</li> <li>Key messages and briefing materials</li> <li>FAQs</li> <li>Training needs assessment</li> <li>Role to persona analysis</li> </ul>	<p><b>DELIVERABLES:</b></p> <ul style="list-style-type: none"> <li>Update change description document</li> <li>Finalized OCM materials</li> </ul>	<p><b>DELIVERABLES:</b></p> <ul style="list-style-type: none"> <li>Update change description document</li> <li>Deliver OCM materials as required</li> <li>Monitor resistance and recommend tactical OCM activities to be added to OCM plan (stakeholder engagement, change network, communications, training)</li> <li>Lessons learned with report to leaders</li> <li>Sustainment plan</li> </ul>