










Typical roles and responsibilities needed to support change management

Examples of the types of individuals and groups typically involved in the delivery of payments processes and systems are listed below. Your Organizational Change Management (OCM) team will need to validate who is supposed to be doing what tasks in the delivery of PPI. *Note: this is an example, credit unions are not expected to hire for these roles.* The PPI Project Team will consult with you on your change plans and can advise you should you have any questions about who you should engage in your credit union.

Role	Responsibilities
 <p>Executive sponsor</p>	<ul style="list-style-type: none"> Financial Institutions champion of the PPI deployment Primary responsibility is to set and reinforce expectations around the future of payments in their organizations Build and maintain stakeholder buy-in and support, as appropriate Remove barriers and obstacles to readiness, and facilitate access to resources
 <p>Project manager (+ project team)</p>	<ul style="list-style-type: none"> Design the project plan and then implement and sustain the release Manage the project team, budget, and resources Ensure project meets the required schedule and quality criteria Integrate with other key members (executive sponsor, build team, organizational change management, etc.)
 <p>Organizational change management</p>	<ul style="list-style-type: none"> Design, develop and deliver organizational change readiness activities (i.e. leadership alignment / stakeholder engagement, communications, training, coaching and resistance management plans) to enable adoption and proficiency with new payment processes – scope is only organizational and not specific activities required for specific organizational units Coach organizational units on designing, developing and delivering their own change readiness activities Responsible for design of business message and timing of release communications – consult release management on their development and delivery
 <p>Payments build team</p>	<ul style="list-style-type: none"> Designs, develops and delivers required configurations and/or customizations to align internal CU systems and processes with IPCC application program interfaces Align, schedule environments and coordinate user acceptance testing (UAT)
 <p>Release management</p>	<ul style="list-style-type: none"> Consult and communicate technical changes in their systems, confirm and approve system outage dates Develop and deliver organizational change management communications, especially outage announcements – organizational change management responsible for design Engagement of organizational units using typical release management protocols
 <p>Document management</p>	<ul style="list-style-type: none"> Tracks and all key changes to system configurations and customizations Develop / update functional specifications outlining how updated configurations and customizations work
 <p>IT operations</p>	<ul style="list-style-type: none"> Accountable for their team's availability and attendance for UAT and validation of change impacts Accountable for their team's attendance and completion of required change readiness activities (i.e. training, workshops, townhalls, etc.) Reviews all key changes to system configurations and customizations Consult executive sponsor, project manager, or organizational change management at business readiness checkpoints on whether readiness criteria has been met to Go-live Consult on participants for UAT Consult with project manager, release management, and with their business / functional units on necessary activities to prepare new payments systems / processes
 <p>Business / functional units (Impacted)</p>	<ul style="list-style-type: none"> Responsible for attendance and completion of required change readiness activities (i.e. coaching activities, training, workshops, townhalls, etc.) Responsible for attendance and completion of required UAT activities or validation of change impacts Sign-off on outage dates, typically leader of the business / functional unit Identify, confirm and make testers available; support testing and data validation and sign off on results Understand why PPI is implementing IPCC PaaS in their organization Understand what related people, process and technology impacts are in their areas of activities Assist with change readiness activities in their areas as required (i.e. distribution of communications, reviewing communications, etc.)
 <p>Operational support</p>	<ul style="list-style-type: none"> Informed of outages and their impacts Understand impacts of the new payments system on users Accountable to make their people available to review and update require documentation to support payment processes Report back to the project manager with incidents