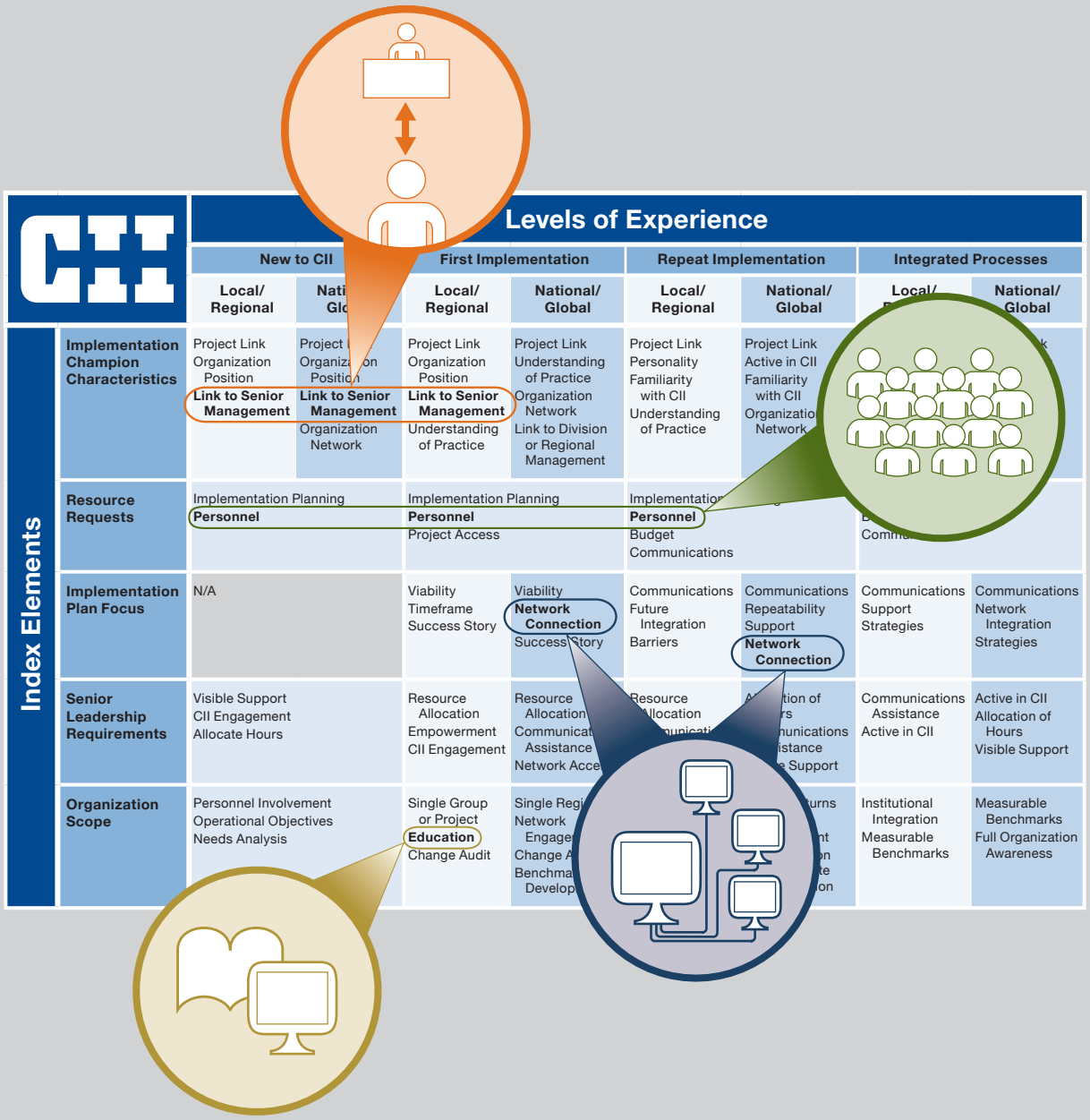
Support for the Implementation Champion: The Experience Reference Index



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Support for the Implementation Champion: The Experience Reference Index

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Executive Summary

As organizations gain more experience implementing CII practices, the requirements for successful implementation change. Although the fundamentals of implementation remain constant over time, the specific concerns of an organization will change according to the scope of the implementation efforts and the organization's experience at implementing new practices.

This research addresses the question "How do implementation requirements differ based on experience and organizational characteristics?" This research studied the extent to which experience with CII practices is an indicator of how implementation efforts within an organization should change over time. The research is a continuation of the CII Research Team (RT) 246 effort to develop an implementation methodology. This document and the Experience Reference Index (ERI) it introduces should be used as supplemental resources to Implementation Resource (IR) 246-2, *The Implementation Planning Model*. *As such, this implementation resource will help implementation teams refine their development of successful implementation strategies.*

Developed from the data obtained in this study, the ERI provides a detailed extension of the Implementation Planning Model, and is based on a recognition that implementation concerns will change over time for an organization. Specifically, it recognizes five key elements affecting implementation success. Each of these elements has a different focal point, depending on the level of experience and the geographic deployment of the organization. Implementers should use the ERI to ensure that specific focal points are addressed at the organization's particular level of implementation experience.

The results of the background study indicate that implementation concerns change as organizations become more engaged in implementing CII practices. Specific findings on such changes in perspective include the following:

- Experienced implementers place a greater emphasis on obtaining communications assistance to convey the implementation message to the organization.
- Experienced implementers understand the value of the link between the Implementation Champion and the network of experts in an organization.
- The geographic deployment of an organization is a primary indicator for determining which focal points an organization should consider.
- Minimal differences exist between contractors and owners in terms of their needs over time and in terms of their perspectives on the primary factors for implementation success.

Introduction

In a continuation of the ISC mission to support Implementation Champions (ICs) specifically and CII members in general during the implementation process, the institute sponsored a study to determine how organizations with different levels of CII experience require different forms of implementation support. The goal was to develop an Experience Reference Index (ERI), a tool that has two main uses: 1) it can help organizations determine what focal points they should emphasize during different phases of their CII experience and 2) it can help new ICs determine the appropriate types of implementation resources for their organizations. The benefits of this research to CII member organizations are as follows:

- Recognize and communicate the different requirements for implementation as the levels of experience change over time.
- Provide guidance for the selection of Implementation Champions who have preferred attributes for particular levels of experience.
- Understand the specific changes that should be made in recommended implementation scope for implementation plans, depending on the level of experience.

The ERI is intended to serve as a support element during the initial phase of the implementation planning effort. As such, it is a guidance tool, designed to determine the impact of experience on the implementation process. The ERI is divided into a matrix with four levels of experience across the top. These levels reflect the organization's familiarity with the implementation process. The vertical side of the matrix comprises index elements that reflect the specific areas that are affected by the levels of experience. Finally, the index specifics are the individual focal points within the matrix that require attention as the level of experience increases over time. Together these components create the ERI matrix, a tool that helps organizations find the best approach to implementation, regardless of experience. *Descriptions of these elements are provided in the following sections and refer to the ERI matrix illustrated on page 3.*

The ERI is intended to directly affect the manner in which an organization and its Implementation Champion approach an implementation effort. Specifically the ERI provides guidance at the following levels:

- *Organizations new to CII get guidance on how to PREPARE for the implementation process and how to select the individuals and projects that are appropriate for initial implementations.*
- *First implementers are encouraged to focus on early process elements that are key to any implementation effort; they are also encouraged to build the networks that are critical to implementation success.*
- *The ERI encourages repeat implementers to emphasize the integration of the effort into existing project and organizational networks; they are also encouraged to understand the importance of communicating results.*

- *Finally, the ERI encourages organizations that are integrating CII processes into their work processes to consider the elements that are required to move new implementations from being individual success stories to being standard operating procedures; these include benchmarking and implementing communication networks.*

From this perspective, the ERI should be used as a lens that ICs use to focus their organizations on the essential areas that lead to success, depending on the level of experience of a given organization.

The following sections introduce the use of the ERI during the implementation process. First, the elements of the ERI are introduced. These are followed by examples of how the ERI is used differently, depending on level of experience. Finally, the conclusion discusses the considerations for how this tool should be used in conjunction with existing implementation documents.

THE CII EXPERIENCE REFERENCE INDEX (ERI)

Index Elements	Levels of Experience							
	New to CII		First Implementation		Repeat Implementation		Integrated Processes	
	Local/ Regional	National/ Global	Local/ Regional	National/ Global	Local/ Regional	National/ Global	Local/ Regional	National/ Global
Implementation Champion Characteristics	Project Link Organization Position Link to Senior Management	Project Link Organization Position Link to Senior Management Organization Network	Project Link Organization Position Link to Senior Management Understanding of Practice	Project Link Understanding of Practice Organization Network Link to Division or Regional Management	Project Link Personality Familiarity with CII Understanding of Practice	Project Link Active in CII Familiarity with CII Organization Network	Project Link Personality Active in CII Organization Network	Project Link Organization Position Active in CII Organization Network
Resource Requests	Implementation Planning Personnel		Implementation Planning Personnel Project Access		Implementation Planning Personnel Budget Communications		Implementation Planning Budget Communications	
Implementation Plan Focus	N/A		Viability Timeframe Success Story	Viability Network Connection Success Story	Communications Future Integration Barriers	Communications Repeatability Support Network Connection	Communications Support Strategies	Communications Network Integration Strategies
Senior Leadership Requirements	Visible Support CII Engagement Allocate Hours		Resource Allocation Empowerment CII Engagement	Resource Allocation Communications Assistance Network Access	Resource Allocation Communications Assistance CII Engagement	Allocation of Hours Communications Assistance Visible Support	Communications Assistance Active in CII	Active in CII Allocation of Hours Visible Support
Organization Scope	Personnel Involvement Operational Objectives Needs Analysis		Single Group or Project Education Change Audit	Single Region Network Engagement Change Audit Benchmark Development	Limited Projects or Groups Visible Returns Community of Practice	Visible Returns Network Involvement Consideration of Complete Organization	Institutional Integration Measurable Benchmarks	Measurable Benchmarks Full Organization Awareness

ERI Research Overview

The current study stands as a complement to IR 246-2, *Implementation Steps to Success*, as well as to Research Summary (RS) 246-1a, *Management Role in CII Practice Implementation*. The original IR 246-2 document provided the general blueprint for implementation success. The ERI is a refinement and addition to this document to specifically address organizations' changing needs as they become familiar with the implementation process. The underlying data supporting the development of the ERI were obtained through a combination of surveys and discussions at CII events. Using these methods, the researcher sought to understand members' current thoughts on the implementation process. This data augmented existing data on the primary barriers and strategies facing ICs during the implementation process.

The data collection effort brought in responses from 70 individuals representing 37 owners and 33 contractors within the CII membership. This was 59 percent of the the CII member company population at the time of the study. The focus of the survey and the discussions was to augment the current understanding of implementation in terms of how implementation changes over time in an organization, depending on its experience at implementing new practices.

As detailed in RS 246-1c, *Successfully Supporting the Implementation Champion*, the survey documented the current implementation focus of the CII membership (i.e., front end planning), the potential area of weakness in implementation (i.e., communication), differences between new and experienced implementers when it comes to considering implementation requirements, and IC characteristics. The combination of these findings with existing data provided the foundation for the Experience Reference Index presented in this document.

The ERI is a user-based answer to the question of how implementation needs to change as organizations become more experienced with new practices. The ERI directly addresses the challenge of where ICs should focus their attention during the implementation process. Implementation teams should use this document as a guideline to ensure that, depending on their level of implementation experience, their scope of effort neither neglects key implementation elements nor strays significantly from the key elements of implementation success.

ERI Structure

As illustrated, the ERI is composed of three structural elements, which together form the ERI matrix. The three elements are as follows:

- **Levels of Experience** – The top of the matrix focuses on the levels of experience that an organization has with implementing CII practices. The levels are divided into four main categories: 1) New to CII, 2) First Implementation, 3) Repeat Implementation, and 4) Integrated Processes. These categories are then subdivided into Local/Regional and National/Global subcategories, each reflecting unique concerns. **The first step in using the ERI, (described below), is to determine the organization's level of experience.**
- **Index Elements** – The Index Elements are located on the left side of the ERI matrix. These are the five areas of implementation focus that require a change in focus over time. The five elements (discussed in detail below) are the following: 1) Implementation Champion Characteristics, 2) Resource Requirements, 3) Implementation Plan Focus, 4) Senior Leadership Requirements, and 5) Organizational Scope. **Once the appropriate level of experience is determined, the implementation team should focus on each of these five areas individually to determine the specific concerns for the implementation process.**
- **Index Specifics** – The ERI matrix is defined by the levels of experience and the index elements. The combination of these two sets of factors provides a matrix location for each pair. Within these locations, the ERI presents index specifics. The index specifics are the individual concerns that must be addressed by the implementation team for each index element at a specific level of experience. **The task of the implementation team is to understand and address each index specific during the development of a specific implementation plan.**

The following sections provide specific information on each set of ERI factors. They are followed by examples of how to use the ERI based on individual level of experience.

Levels of Experience

Level of experience was selected as the primary metric due to its impact on the implementation process. Specifically, the greater the number of implementations that an organization has undertaken, the more the focus of the processes required for implementation will change. As an organization becomes more familiar with the requirements of implementing new practices, the scope of implementation will change and the level of support requirements will be modified. These changes will require shifting focal points for successful implementations. The levels of experience reflect this change over time.

The ERI levels of experience are as follows:

- **New to CII** – The New to CII level includes organizations that have yet to undertake the implementation of a CII practice. This phase of implementation is not time-dependent. Rather, it is process-dependent. An organization remains at this level until it begins an implementation effort. The focus of this level is learning about potential practices and understanding the implementation process.
  - *Impact on Implementer* – The New to CII category gives users the initial elements to consider when undertaking an implementation plan. The elements are intended not only to develop awareness of implementation concerns, but also to ensure that the team remains focused on essential implementation elements.

- **First Implementation** – Once an organization commits to implementing a practice, it changes status to First Implementation. At this level, the organization will shift to a focus on understanding how to make the first implementation effort a success. However, success may be defined in different ways for different organizations. It does not necessarily mean achieving a fully integrated standard operating procedure. Each implementation team must define success for itself.
  - *Impact on Implementer* – The First Implementation level will focus the implementation team on implementation concerns that are essential to creating a successful first implementation effort. The implementation team is guided to focus on using essential implementation elements to build a foundation for future efforts.

- **Repeat Implementation** – The Repeat Implementation level occurs after the completion of the first implementation effort. The focus now changes from successfully completing a first effort to developing strategies that enable repeated success, both at a broader organizational scope and potentially with greater impacts. The additional implementation efforts may be sequential or parallel, depending on the needs of the organization. However, organizations at this level are typically still exploring the benefits and opportunities of CII practices and may not have set an explicit goal of integrating new practices into standard operating procedures for each implementation effort.
  - *Impact on Implementer* – The Repeat Implementation level guides the implementation team to look at a broader set of issues associated with implementation. It is assumed at this level that the team has successfully undertaken an implementation effort, and this level is requires the team to be made up of individuals who are moving to the next stage of implementation success.

- **Integrated Processes** – At this final level, the organization is focused on adopting practices with the intent that implementation efforts will become integrated practices within the organization. This integration indicates that a practice is approaching or has achieved the status of a standard operating practice within the organization. Organizations at this level have the consistent goal of integrating new practices into standard operating procedures because they have successfully completed implementation efforts in the past.. The timeframe for reaching this level will vary, depending on the implementation focus of the organization. As a general rule, the larger and more geographically dispersed the organization, the longer it will take to reach this level.
  - *Impact on Implementer* – The final Level of Experience, the Integrated Processes level guides the team to consider organization-level concerns. The team will be focused on broad concerns and should thus be oriented toward long-term solutions.

Each of the four levels of experience is subdivided into two geography-based categories: local/regional and national/global. These subdivisions recognize the unique implementation challenges that increase for an organization as the geographical scope of the organization increases. This division is based on research that indicates that distance affects the distribution of information, the effectiveness of communities of practice, and the sharing of knowledge, to name only a few. From this perspective, implementation has different requirements and faces different barriers as it moves to a national or global level.

Index Elements

The second component of the ERI is the set of index elements. The index elements are the specific areas of implementation that are likely to change over time as an organization becomes more familiar with the implementation process. Whereas previously, CII has documented a generic process for implementation that is applicable to all organizations, the index elements address the issues that require differing levels of support and emphasis as the organization increases its implementation efforts. These issues will ultimately determine whether the process succeeds for a specific effort. The ERI index elements are defined as follows:

- **IC Characteristics** – The RT 246 publications and ongoing discussions with the CII membership support the observation that IC requirements change as the level of experience matures for an organization. The ERI acknowledges these changing needs by focusing on the primary considerations for selecting IC(s) at any given point in time.
- **Resource Requirements** – An IC requires resources to enable implementation success. However, the focus of these resources changes according to the scope of the implementation. This element reflects the changes in these needs as the level of experience changes. As illustrated, this is the only element that is consistent for both subcategories of experience at each level.
- **Implementation Plan Focus** – Once the decision has been made to undertake an implementation effort, an implementation plan should be developed. However, the scope of this implementation plan must take different elements into account, depending on the level of experience. As illustrated, initial implementations should focus on a very specific scope, while later implementation efforts should include broader organizational considerations. NOTE: The New to CII stage has no entry because no implementation has commenced at this stage.
- **Senior Leadership Requirements** – Implementation cannot succeed without the support of senior leadership. This element provides guidance for these requirements according to the organization's level of experience. As illustrated, this element includes both fiscal requirements, such as allocating monetary and personnel resources, and non-fiscal requirements, such as supporting implementation through newsletter articles, discussions at senior leadership meetings, and appearances at meetings where implementation successes are discussed.
- **Organization Scope** – The final element emphasizes the need to consider the organizational scope of the implementation. This consideration includes both geographic and strategic scope. Although the considerations are different for the two subcategories in the ERI, the concept is consistent in that scope broadens over time, and the importance of the network becomes increasingly important to implementation success.

Index Specifics

The levels of experience and the index elements provide the matrix reference points for the index specifics. Each entry contains two to five specific bullet points. These bullet points are the focus considerations that reflect the needs of an organization at that level of experience and for that index element at that point in its implementation journey. For example, an organization that is undertaking its first implementation and is a local/regional organization should focus on three bullet points in terms of plan focus: 1) the viability of the implementation effort; 2) the timeframe that is anticipated for the effort; and 3) the potential for achieving a success story from the first effort. The changes in the bullet points as the levels of experience change reflect the fact that, as organizations increase the number of their implementation efforts, experience and scope change what they must consider.

The index specifics are based on a combination of several input factors, including the following:

- research inputs from previous CII implementation research efforts, including IR 246-2
- discussion comments from Board of Advisor roundtables
- discussion sessions during Product Implementation Workshops
- existing research in the fields of change management and process improvement, among others.

These inputs have helped determine which index specifics are required at each level of experience. As illustrated in the matrix, the index specifics change over time and do not occur at every level. These changes occur because the implementation needs differ as organizations gain more experience and as the scope of implementation changes. The index specifics reflect these changing needs and provide an isolation of focus for the organization during the implementation process.

The division of the matrix into this structure allows any organization to isolate the points that should be considered during an implementation effort. However, the reader should remember that the matrix reflects a level of familiarity with the implementation process.[1] What this translates to in terms of the matrix is that, as an organization reaches a new plateau, it does not forget the previous requirements, but rather the previous requirements should be incorporated in addition to the new focal points. For example, the viability of implementation success should not be forgotten as an organization moves to repeated implementations. Rather, viability becomes a background concern supporting the focal points established for the new phase of experience.

[1] The reader is referred to the CII publications introducing and supporting implementation including IR 166-2, IR 166-3, and IR 246-2.

Additional Considerations

Although the index specifics provide a general guideline for implementation efforts, owners and contractors should consider other issues to determine whether their organizations require additional modifications to develop a successful implementation plan. The following considerations are based on comments and observations made in ISC discussions with CII event participants.

Contractors

Size of Projects – Contractors should consider the scope of projects that are typical of their organizations when undertaking an implementation effort. Organizations that undertake large projects over an extended time frame should consider characterizing the implementation effort under the nation/global subcategory. This is due to the independent nature of large project organizations, which are more comparable to regional offices than project offices.

Matrix vs. Hierarchical Organizations – In situations in which project managers are organized into a matrix to provide greater authority and independence than they would have in hierarchical organizations, implementation efforts will require support from the project managers to enhance the probability of success.

Collaboration Model – The level of collaboration and integration with suppliers and project stakeholders will affect the implementation process. For project and execution processes that regularly involve representatives from multiple organizations on a team, consideration should be made for the viability and timeline implications of unilaterally implementing a new process.

Owners

Internal vs. External Staff – Owners that have an internal project management and execution staff will have a greater degree of leverage in implementing new processes than organizations that contract project execution oversight.

Communities of Practice – In national and global organizations, any communities of practice that oversee the standardization of practices must consider the role that the IC plays in relation to its concerns. Changes in the implementation plan may be required to specifically address the relationship between the IC and the community of practice.

Mature Implementers

A special note of consideration is in order for organizations with existing practices in place that are either internally developed or based on existing CII research. These practices will be affected by new CII research results or practices. Since new research is continually emerging and can affect existing practices, this is a common scenario. If an organization finds that it has existing practices that will be affected by a new finding, then it should address the new research at the Integrated Processes level. Organizations in this situation should also understand that additional issues must be addressed as follows:

- Understand that the new implementation will require a more aggressive approach from the IC, since the existing practice was already advertised as a significant improvement for the organization. Now, the update has to be conveyed as another major step forward – this could get pushback by the organization's personnel.
- Develop a clear statement of why an existing process is being changed. Since it has already been established as a successful practice within the organization, it will be necessary to develop a clear statement of why it is no longer sufficient.
- Develop a specific objective or set of objectives that will be addressed by the new implementation; this will provide initiative for individuals to undertake this additional implementation effort.
- Develop a communications plan that explains to all individuals that practices are living documents and that, as the operating environment changes over time, every practice is subject to updates.
- Develop a timeline for implementation as soon as possible to prevent confusion in the organization concerning which practice is the current practice. It is important to make the conversion to the new practice as quickly as possible and to avoid phased implementations if possible.

Example of Index Use

An example from each level of experience will illustrate the use of the ERI: 1) a regional organization that is new to CII; 2) a national organization attempting its first implementation; 3) a regional organization that is undertaking its third implementation effort; and 4) a global organization that is focusing on integrating a CII process.

New to CII

		Level of Experience
		New to CII
		Local/Regional
Index Elements	Implementation Champion Characteristics	Project Link Organization Position Link to Senior Management
	Resource Requests	Implementation Planning Personnel
	Implementation Plan Focus	N/A
	Senior Leadership Requirements	Visible Support CII Engagement Allocate Hours
	Organization Scope	Personnel Involvement Operational Objectives Needs Analysis

This first example considers a regional organization that has recently joined CII and has decided to explore implementing its first practice in the area of safety. The implementation selection team is not yet ready to start the implementation, but has decided to narrow its focus on what practice it will implement in the near future. The organization has no experience with CII implementations, so it wants to ensure that the implementation team remains focused on the appropriate tasks to undertake. With this focus, the team follows the process outlined for using the ERI. First, the organization identifies itself as New to CII and as a Regional organization. This provides the level of experience category and provides the focus for determining the specific areas of concern for each index element.

As illustrated, the team first needs to select the appropriate IC. In this scenario, the organization begins to look for an individual who has a strong link to possible projects, is a respected project manager, and has a strong link to the operations director responsible for safety initiatives. Additionally, the head of the implementation team should begin to talk with senior management about getting the implementation team that is responsible for implementation planning and allocation of personnel resources involved in the initial implementation trial. In return, the head of the implementation selection team discusses with the operations director the need for visible support and the allocation of hours to team members when they decide on a specific safety practice to implement. Additionally, the discussion focuses on which members of the team and which management personnel will continue to be actively engaged in CII in order to stay abreast of the information and support necessary to successful implementation.

Finally, the implementation planning team understands that overreaching on its first implementation would be a serious mistake. Therefore, the team begins to plan on the scope for the initial implementation effort, which includes an assessment of which personnel will be involved and a definition of the limited scope of the operational safety objectives that will be pursued. With this

understanding in mind, the team begins a formal needs analysis process to determine which area of safety could be the focus of the initial implementation effort. The organization has not selected a specific practice to implement, but has selected an area of interest, is performing the necessary preparatory work, and will be in a good position to undertake the first implementation. Having taken these preliminary steps, the actual implementation can proceed with the appropriate staffing, a well defined scope of work, and the necessary support from key individuals in the organization.

First Implementation

In many instances, being at the first implementation level can be the most difficult, since it challenges an organization to adopt a proactive perspective and focus on change. This example involves a national organization that is attempting to implement a focus on innovation to enhance its competitiveness within its market sector. Approaching a first implementation from the perspective of the ERI, the organization first settles on the second category of the index—First Implementation—as its experience category. Within this category, the organization selects the National/Global subcategory. The organization is now ready to address the index specifics associated with each of the index elements. As a first implementer, the organization first needs to ensure that the appropriate IC is selected.

		Level of Experience
		First Implementation
		National/Global
Index Elements	Implementation Champion Characteristics	Project Link Understanding of Practice Organization Network Link to Division or Regional Management
	Resource Requests	Implementation Planning Personnel Project Access
	Implementation Plan Focus	Viability Network Connection Success Story
	Senior Leadership Requirements	Resource Allocation Communications Assistance Network Access
	Organization Scope	Single Region Network Engagement Change Audit Benchmark Development

As indicated, the organization should be selecting an individual with project links, an understanding of the proposed practice, a strong organizational network, and a link to division or regional management. The IC needs to have access to implementation planning resources and appropriate personnel, as well as to the project environment in which the implementation will take place. The IC must then emphasize in the implementation plan the viability of the process and ensure that a success story will result from the effort. However, the IC cannot accomplish this without the assistance of senior management. From this perspective, the IC requires resource allocation, communications assistance, and network access from senior management.

Finally, the scope of the implementation must be controlled to ensure the greatest opportunity for success. As illustrated, the IC should limit the scope to ensure that a single region is emphasized, that the organizational network is engaged in the process, that a change audit is successfully

completed, and that a benchmark development is conducted to establish clear success metrics. The consideration of these index specifics prepares the organization to undertake the new implementation. At this point, the organization should also refer to IR 246-2, *Implementation Steps to Success*, to put in place an implementation plan. This plan should both reflect the specific needs of the organization in terms of experience level and incorporate the basic steps that have been established for a successful implementation planning process.

Repeat Implemetation

In the next example, the organization is already familiar with the elements of implementation. At this point, it has experienced the challenges of an initial implementation and is facing the issue of repeating and expanding the implementation process. In the past, it successfully implemented a focus on safety and a focus on materials management, and is now attempting to implement front end planning within the organization. This places the organization at the Repeat Implementation level within the levels of experience and within the Local/Regional subcategory. The following description addresses the index specifics that should be addressed in this scenario. However, these specifics assume that the organization is also addressing the requirements from earlier stages in the ERI. These earlier index specifics must not be forgotten as the organization moves to a new level. Given this assumption, the first index specific to consider is who is going to lead the implementation.

		Level of Experience
		Repeat Implementation
		Local/Regional
Index Elements	**Implementation Champion Characteristics**	Project Link Personality Familiarity with CII Understanding of Practice
	Resource Requests	Implementation Planning Personnel Budget Communications
	Implementation Plan Focus	Communications Future Integration Barriers
	Senior Leadership Requirements	Resource Allocation Communications Assistance CII Engagement
	Organization Scope	Limited Projects or Groups Visible Returns Community of Practice

As illustrated in the matrix, the specifics that are recommended for the IC call for an individual who has a strong link to projects, has a personality that can sell the practice, is familiar with CII, and fully understands front end planning concepts. The next index specific addresses resource requirements. At this level, the organization needs to ensure that the IC has access to an implementation planning team, personnel to implement the practice, budget to cover implementation expenses, and communications assistance. In the same manner, the focal points for the implementation plan, senior leadership requirements, and the organizational scope of the implementation should be considered. At the conclusion of this process, the implementation team needs to take into account any special circumstances that may be relevant to the organization, as described below. For example, if the firm lacks an office of project management, the team may need to bring in a front end planning facilitator to guide the front end planning process.

Once the organization has addressed all of the index points and considerations, the team should develop an implementation plan that reflects these specific points as they modify the four steps defined in IR 246-2 (i.e., preparing, initiating, growing, and establishing). In this manner, the team will have an implementation plan that both reflects the organization's specific needs, in terms of experience level, and incorporates the basic steps that have been established for a successful implementation planning process.

Integrated Processes

		Level of Experience
		Integrated Processes
		National/Global
Index Elements	Implementation Champion Characteristics	Project Link Organization Position Active in CII Organization Network
	Resource Requests	Implementation Planning Budget Communications
	Implementation Plan Focus	Communications Network Integration Strategies
	Senior Leadership Requirements	Active in CII Allocation of Hours Visible Support
	Organization Scope	Measurable Benchmarks Full Organization Awareness

The final example scenario is the case of an international organization that is an experienced implementer taking the next step toward improvement. The plan is to implement a management-oriented practice in the area of building the next generation of project managers. The organization has successfully implemented four practices in other areas, including front end planning and constructability. The practices have been implemented in several divisions in multiple geographic locations. A number of regional ICs undertake the task of overseeing the implementation process and are well-versed in the process. Additionally, the ICs and senior management are all engaged in CII through committees and conference attendance. At this level of experience, the organization is prepared to undertake a global implementation of the proposed new practice. The organization begins by determining which of the ICs will lead the overall process, considering the number of project links that each IC has and the formal organizational position each holds in his or her respective division. This is important because a global effort will require an individual to have a strong organizational network in place to successfully complete the implementation.

Finally, the organization considers which individual is currently active in CII, so that he or she can obtain the necessary support during the implementation process. Once the IC is selected, the organization focuses on the resources required for the effort. As with previous efforts, the team recognizes that, to undertake a broad implementation effort, it must be in control of planning, budget, and communications. With these resources in place, the team ensures that the focus of the plan not only addresses the details of where and how the process will be put in place, but also that it addresses how the new process will be communicated throughout the organization, how it will be integrated in the global organization, and what strategies will be helpful in this specific

case to support the implementation process. Having previously implemented several practices, the team has commitment from senior management. However, a meeting with the senior management team is arranged to discuss resource allocations and to ensure that visible support is once again provided. The meeting with management also focuses on the need to establish benchmarks that can be used to measure progress and it emphasizes the need to make the entire organization aware of the implementation effort. The team commences the implementation effort by following the planning steps outlined in IR 246-2 and then proceeds to undertake a change audit to ensure that a strong foundation is in place for the new implementation effort.

Conclusion

A successful implementation effort is dependent on many factors. Every implementation has its own concerns and opportunities for success. Understanding these differences is a key requirement for an Implementation Champion (IC). The need to understand which points should be emphasized is particularly important as an organization embarks on a specific implementation at a specific point in time. The needs of the organization will change over time as it becomes more familiar with implementation processes.

This Experience Reference Index (ERI) provides implementation support for organizations as they naturally change over time. Within the context of experience with CII, the ERI provides an activity-based timeline approach to understanding how implementation requirements change over time. It also provides specific points of focus for each element of concern in the context of implementation experience. The ERI is intended to give ICs the additional guidance they need to enhance implementation success, depending on the experience of the specific organization.

The ERI was designed to support the overall implementation process outlined in IR 246-2, *Implementation Steps to Success*. The ERI index specifics will help implementation teams focus their overall implementation efforts. Since there is no one-size-fits-all approach when it comes to implementation, the overall implementation process must be tailored to fit an organization's specific needs in time. The ERI should be used to determine those specific needs and augment the overall implementation process.

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Appendix
Focus Point Definitions

Active in CII – Is the individual engaged on a CII research team or committee or does he or she attend CII events regularly?

Allocate Hours – The ability to control time allocation for implementation personnel.

Barriers – Potential institutional obstacles to implementation success.

Benchmark Development – The development of metrics to determine implementation success.

Budget – The monetary budget required for implementation.

Change Audit – The process of undertaking an implementation change audit as defined in IR 246-2.

CII Engagement – Being involved with CII on research teams or committees to better understand potential impact of practices.

Communications – The communications process and elements required to publicize a practice within an organization.

Communications Assistance – Assistance by communications professionals in the organization to publicize implementation efforts.

Community of Practice – A group of individuals with similar technical or managerial responsibilities.

Consideration of Complete Organization – How will a practice integrate into the larger organization?

Education – The education required by personnel affected by a new practice.

Empowerment – Having the authority to make changes required for implementation.

Familiarity with CII – Knowledge of CII practices and potential support network to the extent that questions from others in the organization can be answered regarding proposed practices.

First Implementation – A CII member organization that is undertaking a first implementation effort.

Formalized Processes – A CII member organization that has integrated practices into standard operating procedures.

Full Organization Awareness – The communications required to make a practice visible across an organization.

Future Integration – The ability of the new practice to be adopted by the organization considering existing practices and any similarities between the proposed practice and existing practices.

Good Understanding – A CII member organization that has undertaken more than one implementation and understands the issues involved with implementation.

Implementation Planning – The process required to integrate a new practice into an organization.

Institutional Integration – How does a practice integrate into multiple divisions or operating regions?

Limited Projects or Groups – A limited scope of implementation focus, restricted to a single regional area or a small number of project teams.

Link to Senior Management – A personal link based on position to senior managers in charge of implementation to allow for accessibility to management and to obtain support from management.

Measurable Benchmarks – The metrics used to evaluate a new implementation.

Needs Analysis – What are the needs of the organization in terms of a new practice?

Network Connection or Engagement – The opportunity to engage with individuals across the organization.

New to Process – A CII member organization that has not as yet undertaken an implementation effort.

Operational Objectives – The goals for the implementation effort.

Organization Network – The level of engagement with individuals across the organization.

Organization Position – The formal position of an individual in an organizational chart.

Personality – The personality of the Implementation Champion, specifically focused on the ability to work with others to sell a proposed practice.

Personnel – Personnel required to generate an implementation plan.

Personnel Involvement – Getting the right personnel involved in the implementation process.

Project Access – Personal access to project personnel who are influential in implementing a practice.

Project Link – A personal link to key personnel on a specific project.

Repeatability – Can the current implementation effort be repeated by others or at other locations?

Resource Allocation – The ability to control general resources required for implementation

Single Group or Project – Limiting the scope of implementation to a single group or project

Single Region – Limiting the scope of implementation to a single region.

Strategies – Strategies to assist in enhancing implementation success.

Success Story – A story that can be told of a successful implementation effort.

Support – Does the implementation effort have tangible support by senior management?

Timeframe – The length of projected time for an implementation effort.

Understanding of Practice – Level of understanding of the proposed practice, including potential benefits, challenges to existing practices, and requirements for implementation.

Viability – The likelihood that an implementation process will succeed.

Visible Return – Returns required to satisfy return-on-investment requirements.

Visible Support – Providing tangible support and authority to implement the change through corporate communication avenues.

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