

# Innovation Minds PjM Deployment Guide

## Kickoff

### Agenda Items:

1. Introduce your Innovation Minds Deployment Team
2. Discuss your business objectives and success metrics for the project
3. Discuss which team(s) and process(es) will be the focus of the deployment
4. Review your deployment package, timeline, and next steps

**Deployment Team:** This team consists of a Deployment Sponsor, a Deployment Lead, and a small group of Champions.

**Deployment Sponsor:** This person(s) should have the proper authority in your organization to provide clarity as to why Innovation Minds is being adopted, who is expected to use Innovation Minds, what type of work and what communications will happen in Innovation Minds, and when key moments within the deployment process should occur. (i.e., training, launch date, etc.). In certain contexts, this person can also be the Deployment Lead.

**Deployment Lead:** This is the point-person for the deployment of Innovation Minds. This will be the point-of-contact for communications with the CSM (Customer Success Manager) and will coordinate and facilitate the scheduling and execution of calls/meetings for the different touchpoints in the deployment process. In certain contexts, this person can also be the Sponsor.

**Deployment Champions:** Champions are the power users, the early adopters, the influencers, the sherpas on your path to collaborative nirvana. It is smart to have a healthy mix of individuals that are enthusiastic for this new change and others that are hesitant. Good change management means giving all voices the time and space to be heard. Our experience shows that successful deployments involve a group of champions within an organization to help pave the way for successfully adopting Innovation Minds. How many do you need? A good rule of thumb is to have at least one Champion for every 5 users in your account.

**Users:** Also known as end-users, are everyone else in your organization who will be utilizing the Innovation Minds Platform.

## Change Management

Initiation and Discovery – plan for change:

- Identify how ready your organization is
- Understand who will be impacted
- Define how to effect change within your culture
- Develop communication and training plans
- Understand which stakeholders may struggle with the change and plan to support them

Configuration and Go-Live – prepare for change:

- Create and execute communications
- Train your stakeholders
- Prepare reference tools

Close-Out – reinforce change:

- Continue communications
- Monitor results
- Identify and make needed tweaks

## Discovery session(s)

Key focus areas of this session will be:

- Understanding what initiates the work
- Who is doing the work
- What are the common roadblocks?

Your CSM will guide you through a series of questions whose answers will help them map your processes into Innovation Minds.

Discuss future-state design

In this session, the CSM will facilitate a discussion around how you want your work to flow and function in the “future state”, using the Future State Discussion Guide to help navigate this conversation.

The Requirements Review

This session focuses on confirming the functional and technical requirements for Innovation Minds. In some cases that includes reviewing and synthesizing design plans based on discovery conversations. For larger, more complex processes, your CSM may request formal requirements documentation with a review and approval process.

It is important to set up a proper framework to support your work. While there are many ways to categorize work, it is best to start with some generic buckets in which you, your team, and your organization can build your work management system. Here are some samples of typical work groupings:

- Work type
- Agile framework
- External clients
- Internal clients
- Departments
- Can we use Roadmap sprint to prime the experience? If so, what department is the focus?
- Users onboarding and maintenance
- Authentication
- Any data migrations involved?

## **Innovation Minds configuration**

It's time to translate your business process(es) into Innovation Minds. Multiple sessions will guide you through configuring your Innovation Minds account. During the Process and Workspace Configuration calls a technical expert will guide you through the process and will help you to unlock the full value of Innovation Minds.

### **Configuration walk-through**

This session is an opportunity for subject matter experts (SMEs) outside the deployment team to “pressure test” the newly-created Innovation Minds workspace. Configuration walk-through helps to ensure that the workflows you have established make sense and will work well for your broader team of end-users.

### **Launch Planning**

At this time, we will finalize training agendas, set training schedules, introduce Standard Operating Procedures in a form of a Knowledge Base, and establish a plan, timeline, and methodology for migrating current projects into Innovation Minds.

Refer to the PjM Guidebook for more detail.

## Go-Live & Closeout

### Champion training

The goal of this training is to get your champions up to speed on more advanced functionality so they can effectively support end-users and collaborators as needed.

### End-user training

This training is designed for end-users and collaborators and covers the day-to-day activities and expectations for individual contributors in Innovation Minds.

### Adoption monitoring

This session is dedicated to post-launch monitoring to help you understand how adoption is coming along. Discuss how you can collect and review feedback to identify where enhancements and refinements might be needed.

### Executive Briefing

It's time to meet with executives on your side to show off what's been developed in Innovation Minds and what's been accomplished to date.

### Deployment Closeout

Review accomplishments, items yet to be completed, and reintroduce you to your Innovation Minds Account/Customer-Support Team.

