

2023 SUIE PROJECT MANAGEMENT SYMPOSIUM

How to Lead Change and Drive Successful Outcomes

BREAK OUT SESSION
POWER SKILLS

SOUTHERN ILLINOIS UNIVERSITY
EDWARDSVILLE



WELCOME.

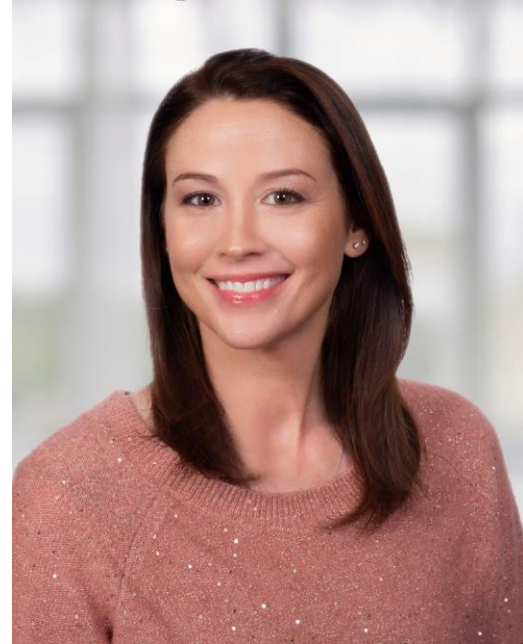
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Insights on Managing Transformational Change

Jaclyn Reiter

Equifax, VP Initiatives Execution

- Life long project, program and portfolio leader
- Family oriented
- Women's network chair
- Senior leader
- Theater enthusiast
- Super power = Speed & Mind Reader



Rules of Engagement

Be Engaged

Please be present

This is interactive; get your phones out for poll questions

Dialogue

No need to wait until the end, have a question...raise your hand

Have a comment, want to commiserate or validate a scenario...raise that hand

Poll Everywhere

Join using one of these options:

Join by **phone**:



Or join by **text**:

Text **"jaclynreiter154"**
to **+33 6 44 60 09 54**

Or join in your **browser**:

<https://pollev.com/jaclynreiter154>

All questions are anonymous
Feel free to **'Skip'** adding a name

A screenshot of the poll interface. It shows a text input field labeled 'Name' with a character count '0 / 50' on the right. Below the field are two buttons: a blue 'Continue' button and a white 'Skip' button. A large orange arrow points from the 'Continue' button to the 'Skip' button, indicating the option to skip adding a name.

What is one word that comes to mind when you think of change?

Nobody has responded yet.

Hang tight! Responses are coming in.

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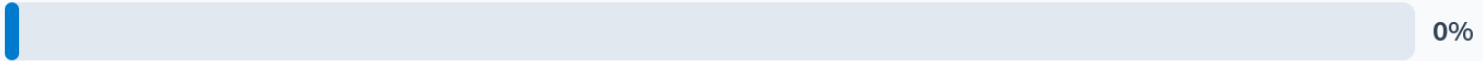
True or False - All change requires similar steps?

TRUE



0%

FALSE



0%

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What Is Transformation?



A dramatic change.



People resist change.



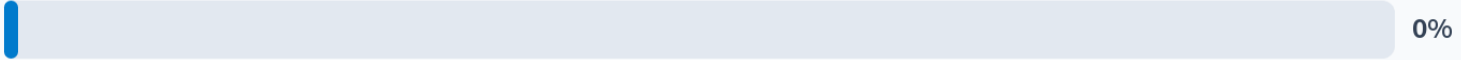
Lots of ways to manage a project, manage stakeholders, manage change.



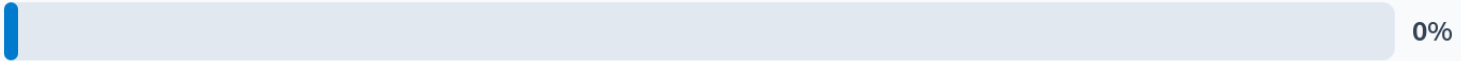
How do you pick what works?

Have you ever seen change management fail?

YES



NO



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Chapter 1.
“Why change is so hard”

On a scale of 1 to 5, how easy is it to make major changes in your personal life?

1 - Very Easy

0%

2 - Somewhat Easy

0%

3 - Meh, Neither Easy nor Difficult

0%

4 - Somewhat Difficult

0%

5 - Very Difficult

0%

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Transformational Change is Hard

Transformation projects need structure, planning and budget

Transformational change means that the organization will be in a different state after the change is implemented, but the most challenging part is that the state is unknown at the beginning. This leads to radical differences in your WHAT and HOW.



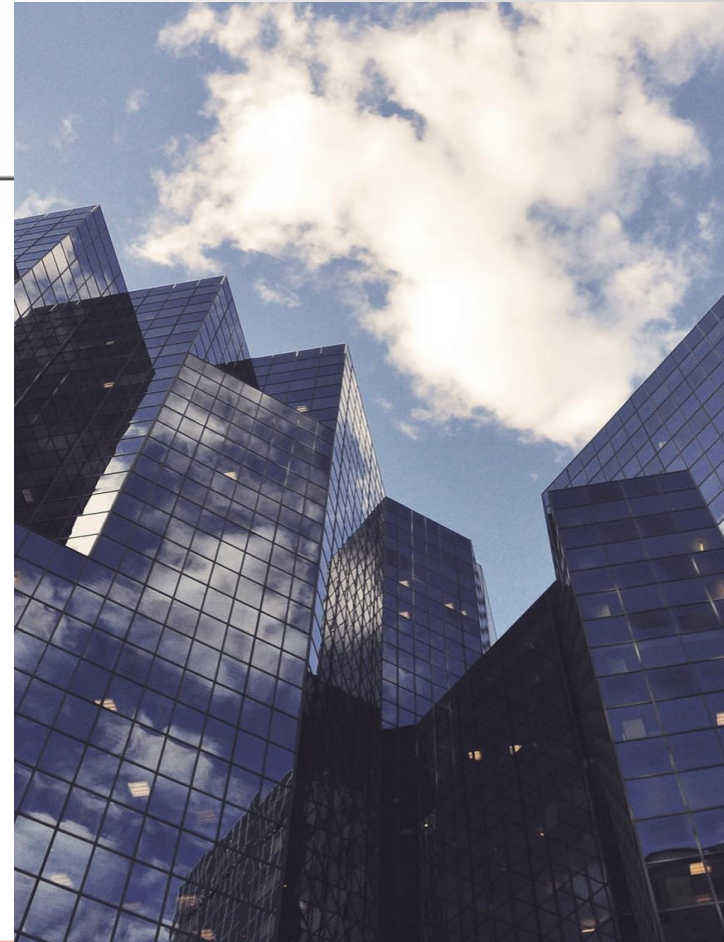
Must have a **STRONG WHY**. Keep teams centered to it.



Leadership must be **BOUGHT IN**.



A **LAUNCH** team will be needed to pull everyone together.



Why does change fail?



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Leading Transformational Change

Successfully executing business transformation takes preparation, strong collaboration and perseverance.



Planning

Project Management.
Relationship Management.
Business Readiness.
Approvals.



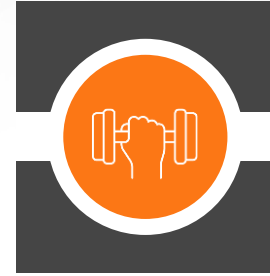
Leadership

Change comes from Top.
Build Success Measures.
Report Up and Out.
Report In and Down.



Launch

Measure Readiness.
Team Approvals.
Executive Approvals.
Execute.
Hypercare.

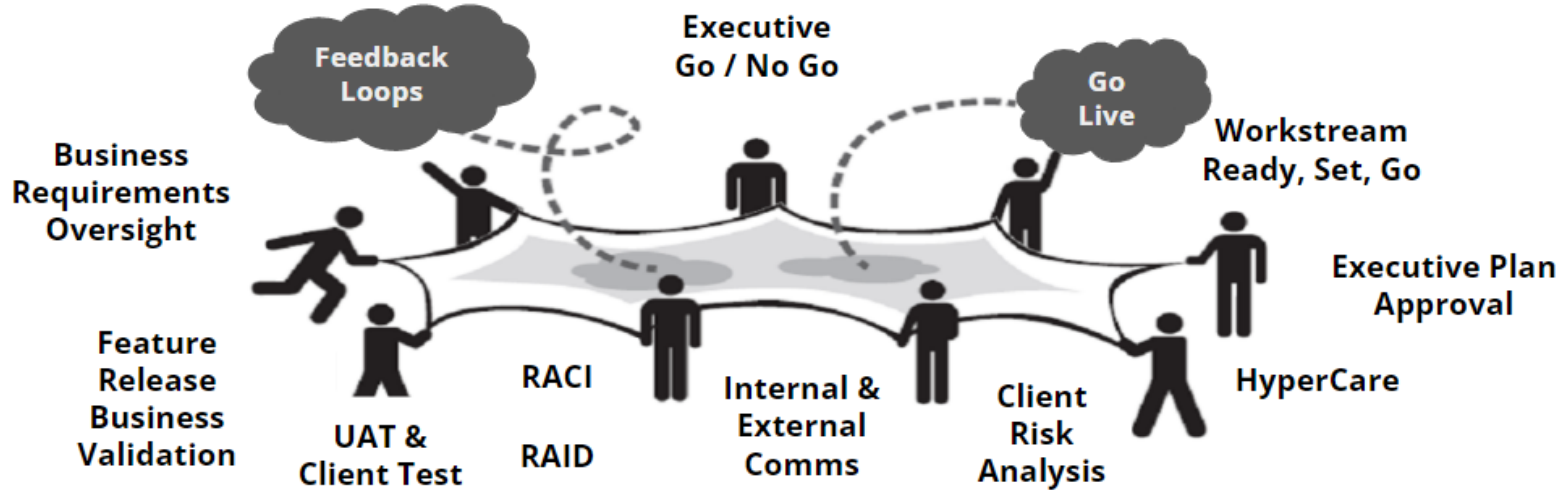


Retro

Record what went well.
Record what needs improvement.
Create your playbook.
Fail Forward.

What Leading Major Change Looks Like

Business Execution Plan



Lessons Learned Analysis & Incremental Readouts

What are some tools you use to manage change?

Nobody has responded yet.

Hang tight! Responses are coming in.

Start the presentation to see live content. For screen share software, share the entire screen. Get help at pollev.com/app



Execution Framework



ALIGN

Who is doing WHAT? RACI will not cut-it. We need ACCOUNTABILITY. Try an Engagement Contract.



BUILD

Build your plan. This is the next level down and often changes. It will ensure the people in your engagement contract are remaining accountable for their areas. Add a Ready, Set, Go! to ensure LAUNCH READINESS.



COMMUNICATE

Is everyone ready for the change? All teams, all businesses, all customers ready to adopt? Then it's time to EXECUTE. Don't forget your HYPERCARE plan.

Chapter 2.

“Tools”

Engagement Contract

Workstream	Owner	Description	Activity	Activity Owner	Rationale
Program	Black Widow	Provides management framework around program lifecycle	Determines critical path for successful launch	Black Widow	Expertise in repeatable launch readiness framework
			Sets Go-To-Market strategy	Captain America	Strategic Alliances Direct & Partner Account Leader
			Sets Technology milestones	Iron Man	Data Products Principal
			Sets Implementation milestones	Thor	Client Implementations Leader
			Sets Sales and Marketing milestones	Black Panther	Partner Marketing Director
			Sets Service milestones	Black Panther	Alliance Director of Client Relations
			Develops Reseller strategy	Hulk	Indirect onboarding client strategy leader
			Drives National and Standalone Stark Industries client strategy	Hulk	Strategic Alliances Director of smashing
			Delivers critical path Leadership updates	Swordman	Indirect onboarding client strategy leader
			Achieves GO status for joint working group Ready, Set, Go!	Black Widow	Expertise in repeatable launch readiness framework
Contract & Pricing	Captain America	Drives strategy and collaboration with Partner to determine best path to product launch	Determines Partner contract term	Captain America	Strategic Alliances & Partner Account Leader
			Determines contract negotiation strategy	Captain Marvel	Senior Director of Client Advocacy
			Completes draft of contract	Captain America	Strategic Alliances & Partner Account Leader
			Leads contract development, negotiation and redlines	Daredevil	Assistant General Counsel
			Determine pricing model	Echo	Strategic Pricing Leader for Stark Industries
Technology	Iron Man	Designs and engineers solution in collaboration with Partner that allows us to go to market	Delivers vision and execution for Stark Industries	Hulk	Data Products Principal
			Drives Stark/Bugle Integration	Wasp	Technical Product Leader for Integrations
			Determines API connectivity to/from Stark Technologies	Quicksilver	Technical Product Leader for Data Acquisition
			Drives Scrum of Scrums for Technology workstream	Warbird	Technical Product Leader for Data Acquisition
			Drives Stark Technologies integration and execution of billing reconciliation	J.A.R.V.I.S.	Technical Product Leader for Stark Industries
			Drives Security strategy and completes Stark Industries Security Questionnaire	Vision	Business Information Security Officer for Stark Industries
			Drives Salesforce and Corporate Systems integration	Ant-Man	Salesforce Execution Leader
Sales & Marketing	Hulk	Accelerates lead generation and speed to revenue through identification of joint objectives and execution of go-forward strategy	Modifies sales training for Partner	Black Panther	Partner Marketing Director
			Aligns S&M workstream to Partner account strategy	Captain America	Strategic Alliances Director
			Deliver sales training to Partner	Hawkeye	Director of Avengers Sales Training
			Train Partner employee to become Stark Technology SME	Hawkeye	Director of Avengers Sales Training
			Pre-Sales SCs/SEs to train Partner Business Consultants	Hercules	Pre-Sales AVP for Solutions Consultants; Pre-Sales Solution Engineer
			Build and deploy Sales and Marketing Plan	Black Panther	Partner Marketing Director
			Create marketing collateral and manage approvals	Black Panther	Partner Marketing Director
			Approves marketing collateral	Beast	Assistant General Counsel for Stark Industries
			Drives collaboration between Sales, Marketing, and Account teams	Captain America	Strategic Alliances Director
			Build and deploy demo site	Wasp	Technology Product Manager

Ready, Set, Go!

Ready, Set, Go! Decision Option #1: SAMPLE for ILLUSTRATIVE PURPOSES. All processes signed off by [enter date] in Production; activate [enter project] for 100% all customers with a plan to quickly address any remediation needed Option #2: enter description here Option #3: enter description here			OPTION 2 SELECTED			By [ENTER DATE], you are ready to start [enter the thing you are trying to achieve]			
ENTER PROJECT NAME HERE: Reverse Thanos' Blip									
WS #	Work Stream	Go ?	Completion Date	Due Date	Dependency	Readiness Criteria	Ready, Set, Go! Decision Owner	Who is communicating and who is tracking?	Questions/Clarification
1	Technology	Ready	11/13	11/17		There should be readiness criteria documented for each workstream	Iron Man Hulk Ant-Man		
2	Marketing	Ready	11/13	11/17			Human Torch		
3	Sales	Decision Needed		11/17		SAMPLE: Notify AE's and AM's and provide any talking points necessary	Thor Spider-Man Deadpool		
4	Operations	Not Ready		11/17	1	SAMPLE: Training completed	Thor Valhalla		
5	Salesforce	Not Ready	11/13	11/17	3		Wasp		
6	Finance	Go wContingency	11/13	11/17			Wasp		Finance provided a Go wContingency based on the assumption that Collections Support will change their status once their criteria is met.
7	Billing	Ready	11/13	11/17			Ghost Rider Phoenix		
7.1	Billing Support Readiness	Ready	11/13	11/17		Support ready to accept this change	Thor Valhalla		
7.2	Collections Support Readiness	Not Ready	11/13	11/17		Collections ready to accept the change	Wasp		Collections Support has training scheduled for 11/21; once training has been delivered they will change their status to Ready.
7.3	RevShare Support Readiness	Ready	11/13	11/17		Support ready to accept this change	Black Widow		
7.4	Tax Support Readiness	Ready	11/13	11/17		Support ready to accept this change	Yellowjacket		
7.5	Pricing Support Readiness	Ready	11/13	11/20		Support ready to accept this change			

Communication & Approval

Schedule

October 2022					December 2022								
S	M	T	W	T	F	S	S	M	T	W	T	F	S
NOVEMBER 2022													
SUNDAY	MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY	SATURDAY							
30	31	1	2	3	4	5	Initiative #1						
							Initiative #2						
							Initiative #3						
6	7	8	9	10	11	12	Initiative #4						
			R/S/G PASSED				Initiative #5						
							Initiative #6						
13	14	15	16	17	18	19							
	Exec RSG email		Exec RSG email	Change Deployment	Change Deployment	HyperCare							
			R/S/G			Change ph1							
20	Ph1 Change Retro	21	22	23	24	25	26						
HyperCare	HyperCare	Hypercare	Hypercare	Holiday HyperCare		HyperCare							
Hypercare	Hypercare	Hypercare	Hypercare	Holiday Hypercare		Hypercare							
27	28	29	30	1	2	3							
HyperCare	HyperCare	Internal Users Migration	Hypercare	Hypercare	Hypercare	Hypercare							
Hypercare	Hypercare	Hypercare	Hypercare	Hypercare	Change Deployment	Hypercare							
	Exec RSG email				Hypercare	Hypercare							

Executive one pager

Name of Initiative

{Enter Project Name} and Post Go-Live Overview Target Date: {Enter DATE}

Executive Summary

One to two sentences summarizing the goal and desired outcome of the initiative/change.

Noteworthy Assumed Risks and Known Issues

Assumed Risk 1: None

Assumed Risk 2: None

Full view of Risks, Issues, and Mitigations [link]<-- link to your RAID log here

Pre Change Summary

Risk Assessment Strategy - Top Clients Impact Analysis Client Revenue - \$AMOUNT?? ← what's are risk if this goes wrong???

Client Communications Strategy Clients will receive a 10-business-day planned outage notification . Link here.

Internal Communications Strategy 10 Business Day notification, 1-day reminder. Link to repository here.

Client Training Strategy and Dates [link]<--link your critical artifacts

Internal Training Strategy and Dates [link]<--link your critical artifacts

Testing Plan [link] and Results [link] <Results summary in 1 sentence>. <--link your critical artifacts

UAT Sign Off [link]<--link your critical artifacts

Ready, Set, Go! Results [link]<--link your critical artifacts

RACI [link]<--link your critical artifacts

Engagement Contract [link]<--link your critical artifacts

Planned Point-of-Change Summary

War room [link] <--link how to access war room: is it chatroom, bridge, physical conference room??

Roll back plan [link] <--link to rollback plan

Support/Call Center status The operations team and (insert leader name) are prepared and ready for (insert project name) at (insert EXACT date and time).

Monitoring <insert (team/name)> prepared and ready for (insert project name) at (insert EXACT date and time).

Leadership update (insert name) will provide an email update to the leadership team by (insert EXACT date and time) that will include overall project status and Issue Resolution Plan tracking information.

Planned Post Go-Live Approach

Post Go-Live Plan Includes Hypercare Plan, Migration Issue Resolution Plan, Operations Automation Plan, continued login monitoring for (insert duration), and continued support/call center updates for <x # of days> until we achieve (insert outcome that allows things to roll from hypercare to business as usual).

Hypercare Plan [link] <--link your critical artifacts

Migration Issue Resolution Plan Tracking led by (enter name) (biz) and (enter name) and (enter name).

Link to tracker [here](#) <--link your critical artifacts

Hypercare Plan

Immediate
Post-Go Live
Support

HyperCare



HYPERCARE

Hypercare Plan

Question	Answer
What is Hypercare?	Hypercare is customer-centered support during a critical period in the project lifecycle.
Why Hypercare?	A truly comprehensive hypercare solution begins before you go live and incorporates members of your deployment team with members of an application management team. Approached this way, the focus is not just on post-deployment stabilization but also on customer enablement and user readiness.
How do I collaborate?	<p>Add a brief description of how someone can collaborate or where to go for help or information in this space. For example...</p> <p>A chat room will be available for internal collaboration to address issues by type. Via Chat space “{insert link to chat room here}”</p> <p>See the {enter link for list here} for descriptions.</p>
<p>What is the escalation path during migration?</p> <p>What are the escalation paths post migration? How do I report an issue?</p>	<ul style="list-style-type: none"> ● Customer issues reported to Account Teams should be reported to this chat room: {enter link to chat room here} ● Customer issues reported to customer support should be reported to the {enter chat room link here} chat. ● Hypercare Internal Issue Management: {enter war room chat link here} and when applicable email {enter email address here} and/or for billing concerns email {enter email address here} <p><i>*Please note that these escalation paths are for internal use only</i></p>
What monitoring/reporting is in place to feed the hypercare review process?	Technology dashboards, chat rooms and migration weekend issue worksheet that is owned and managed by {enter names here}

Retro 360 Feedback

A reflection with opportunities for improvement



{Project Name} - What to continue

Themes	Observations	Leading Practices
Teaming	<ul style="list-style-type: none">• Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua.• Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua.	<ul style="list-style-type: none">• Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua.• Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua.
Planning	<ul style="list-style-type: none">• Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua.• Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua.	<ul style="list-style-type: none">• Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua.• Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua.
Testing	<ul style="list-style-type: none">• Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua.• Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua.	<ul style="list-style-type: none">• Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua.• Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua.
Insights	<ul style="list-style-type: none">• Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua.• Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua.	<ul style="list-style-type: none">• Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua.• Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua.

{Project Name} - What to improve

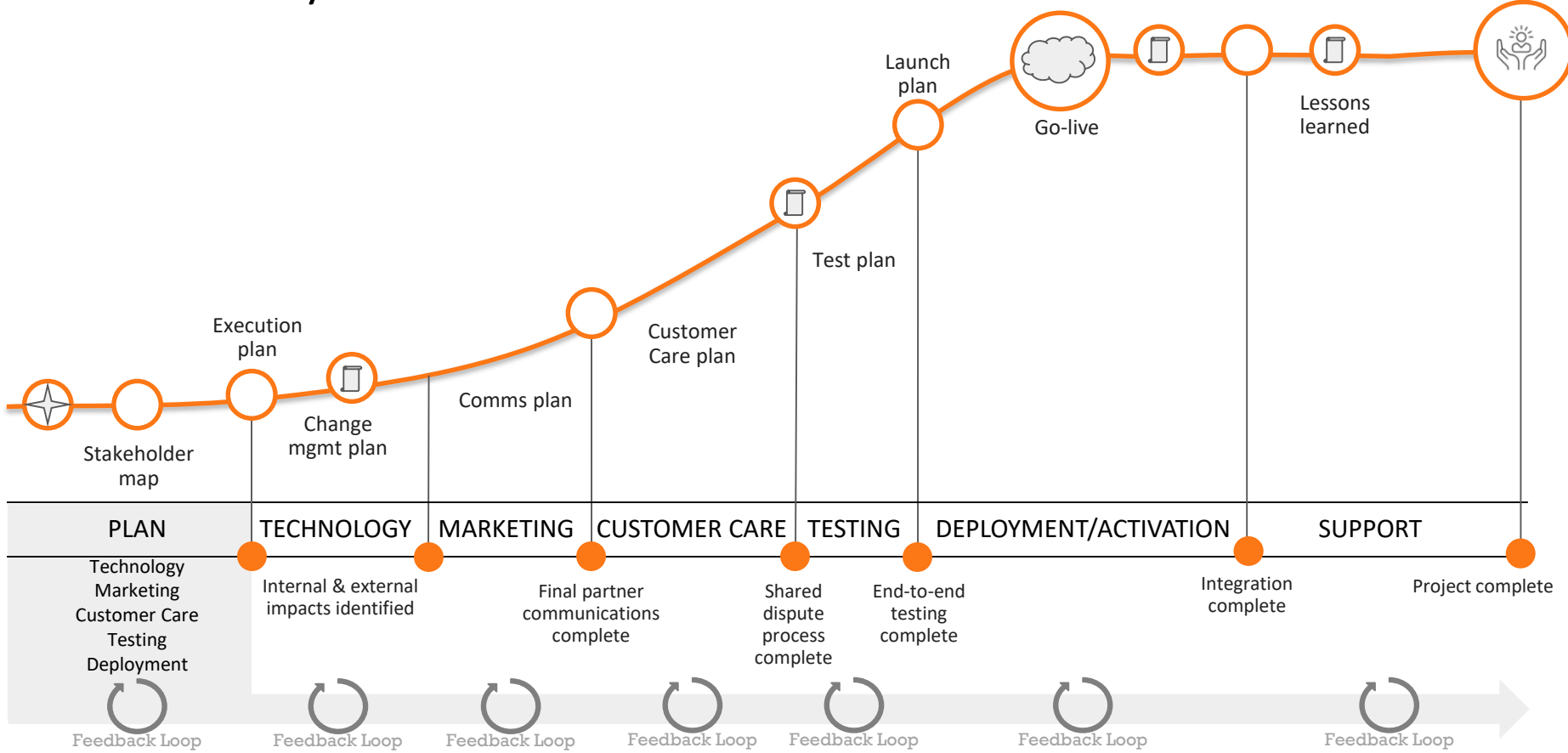
Themes	Observations	Leading Practices
Teaming	<ul style="list-style-type: none">• Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua.• Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua.	<ul style="list-style-type: none">• Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua.• Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua.
Planning	<ul style="list-style-type: none">• Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua.• Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua.	<ul style="list-style-type: none">• Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua.• Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua.
Testing	<ul style="list-style-type: none">• Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua.• Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua.	<ul style="list-style-type: none">• Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua.• Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua.
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The Playbook



How to bring it all together and do it again, and again.

Retro & Playbook

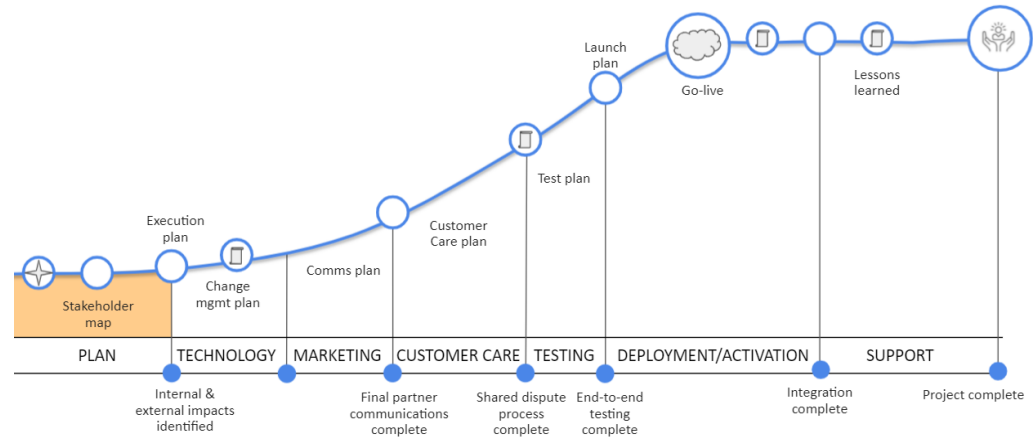


Retro & Playbook

Plan

Assess partner & business impact
Plan for multiple systems integration

Desired Outcome: Align external and internal expectations of project deliverables to achieve comprehensive cross-company business readiness



Deliverables

- [Partner Kickoff](#)
- [North Star - Common Objective Defined](#)
- [Stakeholder Register](#)
- [Execution plan](#)
- [Incentive plan & comms](#)
- [Meeting Minutes](#)

Things to consider

- How do we collaborate with partner?
- Do we have a “One Team” shared identity and purpose?
- What are the internal expectations?
- What are the external expectations?
- Who are all the project resources?
- Is everyone aligned to the objective?
- Is everyone incentivized to deliver?
- What real time collaboration tool will be used?

Joint Decisions

- Who are the decision makers for each workstream?
- What tools will we use to keep track of progress?
- How often do we need to meet?
- Are we using a shared project plan? Or monitoring progress jointly using internal project plans?
- Which project workstreams overlap and how do we engage cross-functional teams?

Stakeholders

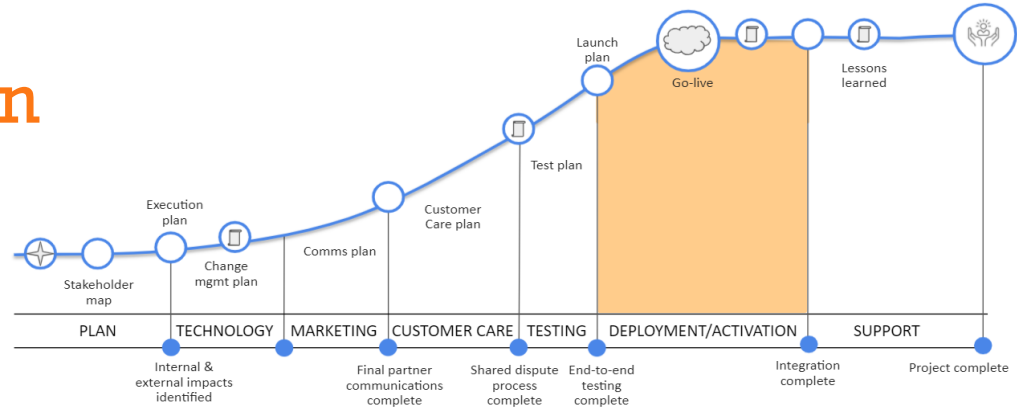


Retro & Playbook

Deployment & Activation

Ensure optimal execution during activations

Desired Outcome: insert description of the ... activated to the ... with optimal performance and transaction monitoring in place



Deliverables

- [Launch plan](#)
- [Readiness checklist](#)
- [Internal Communications](#)
- [Metrics monitoring plan](#)
- [Hybrid Tableau Dashboards](#)
- [Key messaging](#)

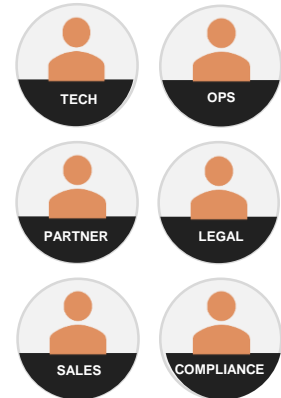
Things to consider

- What is the activation plan?
- Which metrics are relevant in the future state?
- Have we informed both internal and external parties?
- Has leadership delivered key messaging throughout the deployment?
- How many API calls / transactions did we send in a day?
- Is a launch ceremony planned?

Joint Decisions

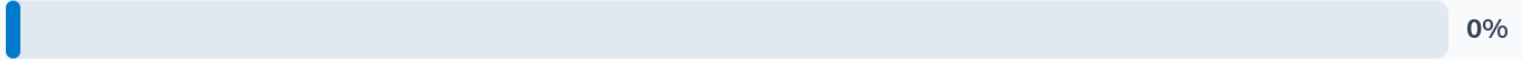
- Who are the decision makers for each workstream?
- Will we throttle volume during launch or enable all verifiers?
- How will partner measure SLA and key metrics?
- When will partner report on SLA and key metrics?
- What is the process for performance improvement?

Stakeholders

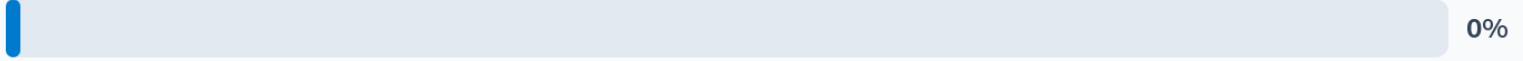


When managing change, do you use consistent communication styles?

YES




NO



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THE TEMPLATES.



What/Why/How?

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Business Goals/Results/So What?

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Milestones

● January 20XX
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● June 20XX
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● October 20XX
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Jan Feb Mar Apr May Jun Jul Aug Sept Oct Nov Dec

● March 20XX
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● July 20XX
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Project Updates



Project 1

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Project 2

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Project 3

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Access to the TEMPLATES

Contact Deanna Lotter at dlotter@siue.edu to get access to the sample templates discussed today

- Sample - Migration One Pager
- Sample - Engagement Contract
- Sample - Ready, Set, Go!
- Sample - Change Calendar
- Sample - Hypercare Plan
- Sample - Playbook & Retrospective
- Sample - Project Planning Templates



CONNECT.

Connect with me: [linkedin.com/in/jaclynreiter](https://www.linkedin.com/in/jaclynreiter)



Jaclyn Reiter, MBA, PMP (She/Her)

Vice President, Initiatives Execution

Greater St. Louis · [Contact info](#)



Equifax Workforce Solutions



Webster University

About

I am responsible for transforming the technologies, processes and data standards that drive productivity and revenue growth for sales, onboarding and support. My team delivers the strategy and execution of lead-to-cash technologies throughout Equifax Workforce Solutions focusing on Salesforce as the hub. This is underpinned by our strategic enterprise back office platforms from Master Data Management to Billing.

I also have the distinct pleasure to serve as the EWS Women's Network chair to empower, develop and connect women through learning and networking opportunities.

Specialties: Strategy & Execution

High performing teams

Delivering business value