The Conference Board of Canada | Le Conference Board du Canada

Agenda

Change Management and Transformation

NOVEMBER 28 – 29, 2017
TORONTO, ON

Accommodation:
Toronto Marriott Downtown Eaton Centre Hotel
525 Bay Street
Toronto, ON

Meeting Objectives:

To BETTER UNDERSTAND key elements of change management and transformation (CM&T) for analytics

To EXAMINE & BENCHMARK with a member organization around CM&T for analytics

To IDENTIFY tools and processes that effectively enable CM&T for analytics

To CONDUCT a case study to better understand the application of CM&T for analytics

To EXAMINE member challenges and barriers as well as solutions to CM&T for analytics

Tuesday, November 28, 2017

5:30 pm   **Networking Reception/Dinner**

The Elm Tree Restaurant
43 Elm Street
Toronto, ON

Wednesday, November 29, 2017

Meeting location

Toronto Marriott Downtown Eaton Centre Hotel
525 Bay Street
Adelaide Room

8:00 am   **Networking Breakfast**

8:30 am   **Welcoming Remarks and Introductions**

Andrew Pender
Associate Director, Privacy, Security and Data Analytics
Conference Board of Canada

Change management and transformation will continue to play a central role in the data analytics world for the foreseeable future. It is a complex process and many pieces need to come together to help organizations effectively leverage evidence-based decision-making. Despite its importance, many organizations find managing the people, processes, and technology involved in change management and transformation challenging. In his opening remarks, Andrew will provide an overview of how we will address this theme throughout the day.

8:45 am   **Keynote Presentation**

Eric Sutherland
Director, Information Management Strategy and Policy
Ontario Ministry of Health and Long-Term Care

Eric will provide a contextual overview of change management and transformation. He will highlight the urgency around this role by drawing on his own experience managing several large, complex business and technology transformation programs. His presentation will address some of the key challenges to change management and transformation—such as managing resistance to change, responding to demand, and sustaining change—and will present strategies to help organizations successfully overcome these challenges. His goal is to help leaders make better decisions by connecting business, technology, and data disciplines while linking enterprise strategy to practical solutions.

9:45 am   **Break**

10:15 am   **Presentation: Managing the Cultural Component**

Krish Banerjee
Practice Lead, Data and Analytics
Accenture Digital
As a practice formalized globally in recent years, change management involves readying the business to be agile and open-minded in its thinking, processes, and leadership. It requires a growth mindset that incorporates different perspectives through collaboration and approaches problems in new ways. Establishing an organizational culture that has strong governance, collaborates with key partners across the organization, is able to overcome resistance, and effectively prepares colleagues to use new tools and skills are crucial cultural components.

11:15 am   **Confidential Facilitated Roundtable Discussion: Overcoming Barriers**

Facilitator: Andrew Pender

In this confidential facilitated roundtable, CCDAO members will identify key barriers to change management and transformation as it relates to implementing data analytics and will discuss how to overcome these barriers. Members will be asked to consider how to convince others of the benefits of the greater use of data analytics, where resistance originates from, and how we can overcome it.

12:00 pm   **Networking Lunch**

1:00 pm   **Member Spotlight: Analytics for Client Engagement**

Clément Brunet
Senior Director, Research and Innovation
The Co-operators

A top priority for the Co-operators, Analytics for Client Engagement (ACE) uses machine learning and predictive analytics to align sales and service efforts towards the highest value leads and activities. One of the biggest challenges ACE faces is change management, and the Co-operators experience reveals that in order to reap the benefits of AI and advanced analytics, organizations must devote more time to change management, as more effort is required to implement analytics than to do the analysis itself.

2:00 pm   **Break**

2:15 pm   **Case Study Group Work: Leadership in Action**

Jeff Walker
Chief Strategist
CAA National Office

In this session, CCDAO members will take the identified business scenario and answer a specific set of questions. They will identify key considerations and other factors at play from a change management and transformation perspective. Smaller business-to-business and business-to-customer groups will discuss and present their findings with the larger group as a whole. The selected case will contain a leadership focus. CCDAO members will delve into what leadership looks like in change management and transformation, what some of the key leadership qualities required are when managing through change and transformation (both generally and for analytics), and what the best leadership tactics are—what members have used that has actually worked and what their recipe was to successfully drive change.

3:15 pm   **Facilitated Discussion: Member Roundtable on Promising Strategies**

Facilitator: Andrew Pender

Based on what we have learned, CCDAO members will identify promising strategies to using data analytics to successfully manage change management and transformation. They will focus on what they can take home and implement in their own organizations.

- People: from a leadership perspective, how can data analytics inform and drive executive decision-making? How can leaders overcome organizational resistance? From a talent perspective, how do organizations identify, acquire, and retain qualified staff (e.g., good data scientists with business skills)? How do they tackle skill mismatches or onboard staff of different generations (e.g., millennials, boomers, etc)?
- Technology: what tools can organizations use to access, harness, understand, and successfully leverage data?
- Processes: what organizational processes will help facilitate the use of data analytics to drive change management and transformation? What incentive systems could be implemented to facilitate the process?

4:15 pm   **Adjournment**