Report of Change Management (CMP) Efforts for Organization-wide Setup and Use of a Project Management System Quire and OneDrive for Effective Projects and Document Management.

Submitted to
CDC-funded Public Health Information Solutions, Surveillance, and Systems (PHIS3)

Friday, November 24, 2023.

Introduction

1.1 Problem Statements

Problem 1: Despite having a paid task management platform, Quire, the platform was underutilized for the coordination and collaboration of projects across units. There was also a lack of organization-wide adoption. PHIS already had Quire in use with 1 Person-of-contact (POC) from each Directorate being administrators, but it was not optimally utilized. Prior to Quire, some teams used other project management tools. E.g., the Health Informatics unit was using the Trello platform for project coordination; while other units utilized Excel spreadsheets as trackers, and many others had no form of project management mechanism.

Problem 2: Important technical and administrative files were stored on the local devices of individual staff members or in shared drives managed by various siloed project teams. This decentralized storage of files hampered access to resources by staff as needed and may have contributed to missed opportunities for knowledge-sharing and collaboration within the organization.
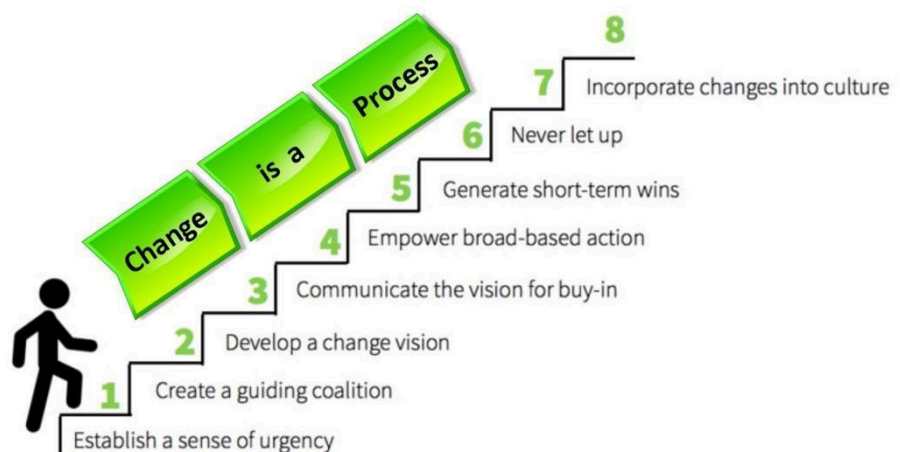
1.2 Purpose of the Assignment

The assignment aimed to address the above-mentioned issues by implementing an organizational change management process to optimize Quire's use for project management and establish a structured way of utilizing Microsoft Shared Drive for efficient resource storage and access across all projects and units. The end goal was to enhance <u>efficiency</u>, <u>coordination</u>, <u>collaboration</u>, and <u>information sharing</u> across the organization.

1.3 Theoretical Framework

For this assignment, Kotter's 8-Step Change Model and the Diffusion of innovations theory were used to reflect on the problems and develop solutions to address them.

Kotter's model provided a structured approach to guide the transition, which aligned well with the organization's need for substantial change in both project management practices and resource sharing. It involved having leadership support, developing and communicating a clear vision of change to the team, creating a sense of urgency, forming a dedicated change management team for mobilization, and removing any anticipated barriers e.g. lack of training.

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7 Incorporate changes into culture
6 Never let up
5 Generate short-term wins
4 Empower broad-based action
3 Communicate the vision for buy-in
2 Develop a change vision
1 Create a guiding coalition
Establish a sense of urgency
Change is a Process

The Diffusion of innovations theory provided the lens through which the survey component was developed and evaluated. It guided how to explore people's current level of adoption of Quire and the one drive and the "why", as well as what can be done to optimize the use of these platforms by staff members.
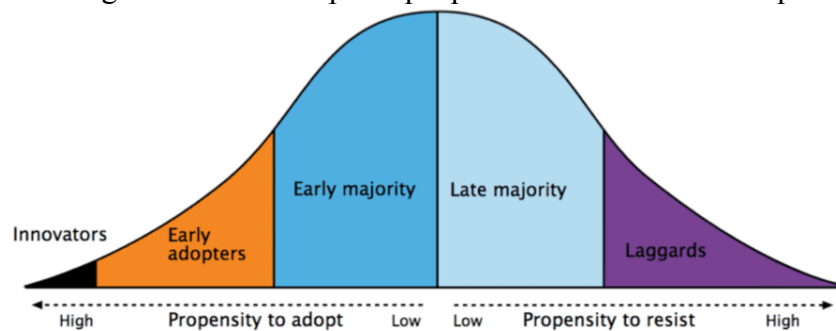

2.0 Activities

2.1 Team Formation and Planning Efforts:
In September 2023, initial discussions regarding the project occurred. The team - Consultant, System Analysis Advisor, and Communications Specialist was formed by the Deputy Project Director. Following the team formation, the change management plan was developed to outline key activities, responsible persons, and dates. The planning team had periodic scheduled meetings to plan each phase of the project efforts.

2.2 Survey Design, Pretesting, Deployment, and Analysis
A survey tool was developed, pretested by 8 staff, and circulated by the Deputy Project Director to the technical units. A total of 28 surveys were received.

Survey Results and Analysis:
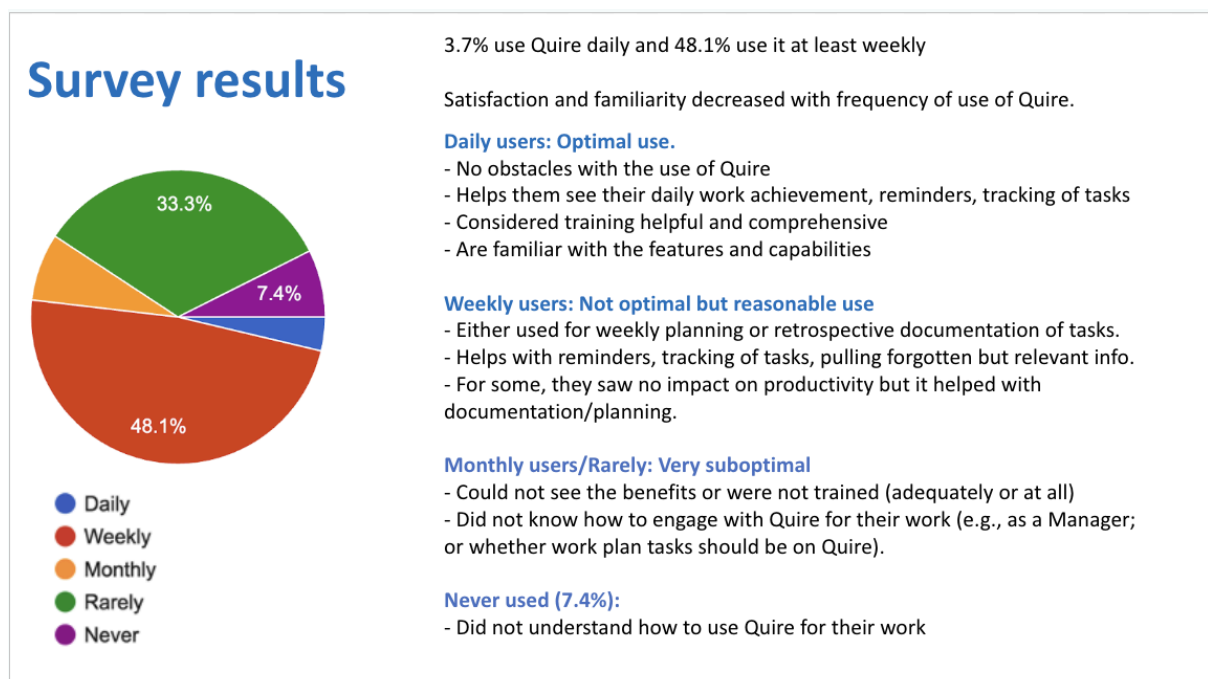
The analysis unveiled insightful trends and provided critical insights into the varying levels of satisfaction, challenges, and areas for improvement in Quire usage among the surveyed staff members.

Usage Frequency of Quire: Only 3.7% reported daily usage, while a significant 48.1% used

it at least weekly.

Satisfaction and Familiarity: There was a notable decrease in satisfaction and familiarity correlating with the frequency of Quire use.

Findings Based on User Groups
    a. Daily Users:
- Experienced optimal use with no obstacles.
- Identified benefits like task tracking and work achievement visibility.
- Considered the training comprehensive and found it helpful.

    b. Weekly Users:
- Indicated reasonable but not optimal use.
- Primarily used for planning or retrospective documentation.
- Recognized benefits in reminders and task tracking.

    c. Monthly/Rare Users:
- Experienced very sub-optimal use.
- Struggled due to inadequate training or understanding of Quire's benefits.
- Some couldn't integrate it effectively into their work routines.
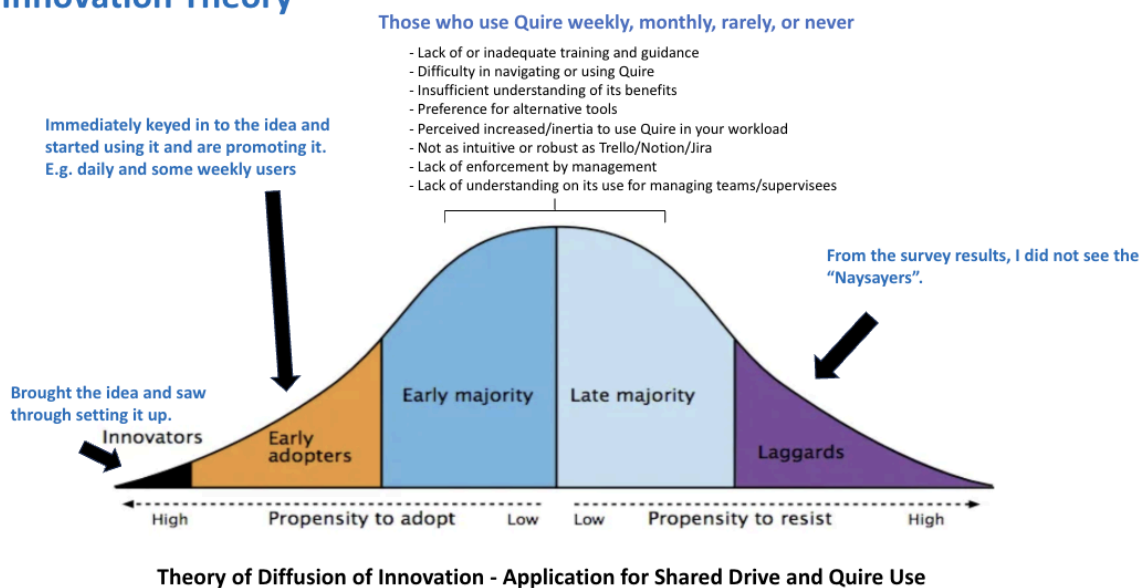
    d. Non-Users (7.4%):
- Lacked understanding of how Quire could be applied to their tasks.

Staff Concerns and Challenges with Quire Usage

Several concerns were raised by the staff regarding the utilization of Quire, including:

- Inadequate training and guidance.
- Difficulty in navigation and use.
- Insufficient understanding of its benefits.
- Preference for alternative tools.
- Resistance or inertia to integrate Quire into the workload.
- Comparison with other platforms like Trello, Notion, or Jira.
- Lack of enforcement or support from management.
- Uncertainty regarding its applicability for team management or supervision.

Interpretation of Current State with Quire Usage using Diffusion of Innovation Theory

Those who use Quire weekly, monthly, rarely, or never
- Lack of or inadequate training and guidance
- Difficulty in navigating or using Quire
- Insufficient understanding of its benefits
- Preference for alternative tools
- Perceived increased/inertia to use Quire in your workload
- Not as intuitive or robust as Trello/Notion/Jira
- Lack of enforcement by management
- Lack of understanding on its use for managing teams/supervisees

Immediately keyed in to the idea and started using it and are promoting it. E.g. daily and some weekly users

From the survey results, I did not see the "Naysayers".

Brought the idea and saw through setting it up.
Innovators
Early adopters
Early majority
Late majority
Laggards

High — Propensity to adopt — Low   Low — Propensity to resist — High

Theory of Diffusion of Innovation - Application for Shared Drive and Quire Use

2.3 Training

Following the survey analysis, three training sessions were conducted to address the identified needs and concerns:

Training Session 1: Quire Training and Shared Drive Overview on October 12, 2023.
Comprehensive training on Quire's functionalities was handled by the consultant, along with an overview of the proposed shared drive setup by the PHIS3 HI Infrastructure Specialist. Participants included Management, Directors, Advisors, and other project team members. A request was made by the Project Director to conduct a follow-up training to help address any concerns with Quire use.

Training Session 2: PHIS3 IT Training on Microsoft SharePoint on November 13, 2023.
Following a meeting between the Deputy Project Director, IT Lead, PHIS3 HI Infrastructure Specialist, Communications Specialist, and the Consultant on October 12, 2023, it was agreed that Microsoft SharePoint would be used centrally by PHIS3 for resource storage and sharing across projects. To this end, the IT Lead created a central SharePoint for the organization and conducted a training on November 13, 2023, on how SharePoint would be used by various projects and teams within the organization.

Training Session 3: Follow-Up Training on Quire on November 20, 2023.
The second training was a follow-up on the first to revisit any aspects of Quire still causing uncertainties or challenges. It provided an opportunity to resolve any concerns raised post-initial training.

Addressing Concerns:

Analysis of Other Apps' Efficiency and Applicability vs Quire:

Notion: Great app but more beneficial for product management teams. Great for use cases, developing user stories and user personas. Not a great fit for a multidisciplinary team. Cost - $8 for plus category; $15 for business category.

Trello: Great app (More expensive; and no obvious benefit over Quire strong enough to revert.

Jira: Great for core development teams. Not a great fit (a little too complex) for a multidisciplinary team.

Email only: Not easy to track tasks, and communication could be lost in the trail. Gets overwhelming.

Jots (Excel or any other tool, e.g., sticky note). Little opportunity for collaboration, no reminders, and more difficult to track.

Quire remains the best option for the PHIS3 context due to its simplicity of user interface, relatively lower subscription cost, and flexibility of use for a multidisciplinary team.

Some Advantages of Quire:
- Makes collaboration easier (all-in-one task management forum). Can integrate with your other apps.
- You can showcase how much work you have done.
- You can see and manage individuals' and teams' workload.
- Cut down on your efforts for weekly and monthly reporting (just download tasks as .CSV or .XLS). You don't have to prepare them from scratch anymore!
- Reminders on upcoming due dates, due dates, and overdue tasks.
- Inputs to performance management efforts.

No tool is **PERFECT**. Quire isn't perfect either but **choosing** to use it optimally will make a **whole difference** in how our work as individuals and as a team.

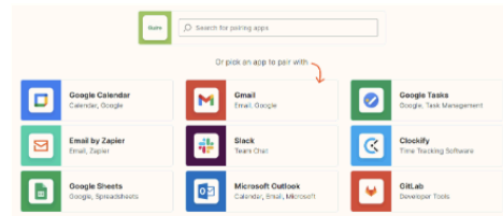**DID YOU KNOW?** It takes less 60 secs or less to update one task on Quire?
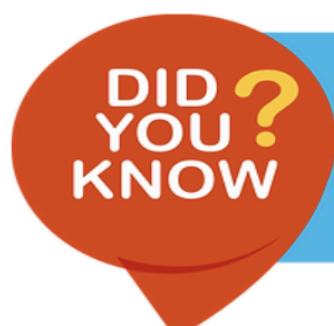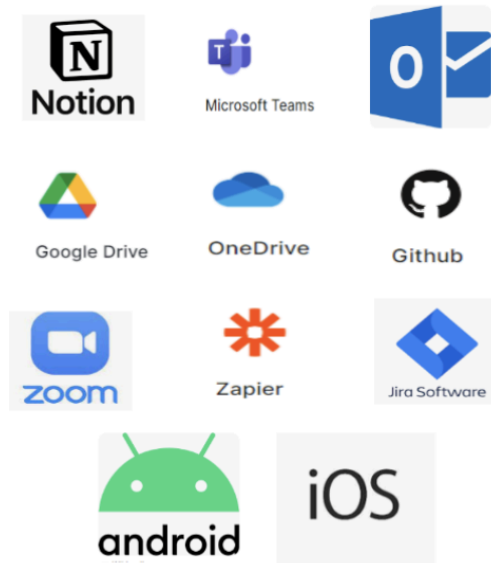
APP INTEGRATIONS

Apps that can integrate with Quire

Other Concerns:

- Need for a comprehensive training
- Need for periodic retraining - TBD (What's reasonable?)
- Need for one-on-one coaching (POCs)
- Quick reference guide
- Workload generally needs to be reduced, e.g., reduced meetings – Beyond the scope of this training, but worth exploring with management

Resources

As part of the comprehensive efforts, several essential resources were developed to support the initiative, including: materials dedicated to the survey pre-testing phase (1.0), survey administration tools (2.0), training materials (3.0), and a policy document for Quire and shared drive use (4.0). See the table for the link to the documents.

S/N	Resource	Link to Resources
1.0	**Survey Pre-testing**	
1.1	Survey Pre-testing Feedback from staff for modifications	Survey Pretesting Feedback tool
1.2	Survey pre-testing results - spreadsheet	Survey - Quire and Microsoft Shared Drive Use (Responses)
1.3	Survey pre-testing results (charts)	Pretest Survey Results - 8 respondents

2.0	Survey Administration	
2.1	Survey Questions - Google Form	Google Form
2.2	Survey Results - Spreadsheet	Final Survey - Quire and Microsoft Shared Drive Use (Responses)
3.0	**Training Materials**	
3.1	Quire User Guide for All	QUIRE User Guide Manual for PHIS3
3.2	Quire Additional Guide for Managers	QUIRE FOR MANAGERS
3.3	Introductory Slides used for 1st Quire Training	Quire Prelim Training Slides.pptx
4.0	**Policy**	
4.1	Policy for the Use of Quire and OneDrive	POLICY FOR USING QUIRE - PHIS3