Qualification: Level 5 CIPD Diploma in Applied Human Resources

Module Name: Contributing to the Management of Change

Learning Outcome 1 - Word Count: 999

Learning Outcome 2 – Word Count: 998

Learning Outcome 3 – Word Count: 999

Student Name: Sophie O'Kelly

Student Number: 1904625

CIPD Membership Number: 55491663

By signing below, I confirm that the work/evidence presented is my own, unaided work. I understand the regulations pertaining to candidate malpractice and the action that may be taken as a result.

Signed: SOKelly

Date: 18/01/21

Chapter of Contents

Chapter of Contents.....Page 1

Evidence Matrix.....Page 2

Learning Outcome 1 Introduction.....Page 5

Learning Outcome 1 Evidence.....Page 9

Learning Outcome 2 Introduction.....Page 30

Learning Outcome 2 Evidence.....Page 33

Learning Outcome 3 Introduction.....Page 51

Learning Outcome 3 Evidence.....Page 54

CIPD Candidate evidence matrix (CEM1)

Candidate name: Sophie O'Kelly				CIPD Membership/registration No.: 55491663		
Qualification title: CIPD Level 5 Diploma in Applied HR				**Unique Learner No. (ULN):** 1904625		
Unit code	**Unit title**	**Assessment criteria no.**	**Evidence description**	**Evidence reference number**	**Assessor initials**	**I/V initials if sampled**
5AMOC	Contributing to the Management of Change	1.1, 3.3	Part of slide deck prepared for external stakeholders evidencing the rationale for change & outcomes achieved.	EV1		
5AMOC	Contributing to the Management of Change	1.1, 1.3, 1.5	Head of Operations email highlighting leaver data, the reason for change and benefits.	EV2		
5AMOC	Contributing to the Management of Change	1.1, 1.5	L&D Update Slide delivered to SLT – highlights 'benefits' of staff induction, areas of risk and next steps	EV3		
5AMOC	Contributing to the Management of Change	1.2, 1.3	Snippets of Employment Advisor Induction Checklist evidencing stakeholders affected by the change and support provided	EV4		
5AMOC	Contributing to the Management of Change	1.2	Email from Senior Manager requesting 1:1 induction support for their Performance Lead to facilitate a new induction	EV5		
5AMOC	Contributing to the Management of Change	1.2, 1.3, 2.1	Day 1 and End of Month 1 Induction Support Calls booked in with Line Managers and New Starters	EV6		
5AMOC	Contributing to the Management of Change	1.3, 1.5	My KPIs evidencing that my time would be required to design, implement and assess the change	EV7		
5AMOC	Contributing to the Management of Change	1.3	Meetings arranged with various colleagues to support with content for induction plans for specific roles	EV8		
5AMOC	Contributing to the Management of Change	1.4, 3.1,3.4	Change Plan	EV9		
5AMOC	Contributing to the Management of Change	1.4, 2.1	Gantt Chart	EV10		
5AMOC	Contributing to the Management of Change	1.4	Communications Strategy	EV11		
5AMOC	Contributing to the Management of Change	1.5	Agenda from SLT Meeting where Induction was initially introduced. Brainstorming session was held which I facilitated.	EV12		
5AMOC	Contributing to the Management of Change	1.5	Email from my Line Manager evidencing agreement for me to initiate the change as part of my KPIs for the financial year and asking me to provide a monthly update at SLT meetings.	EV13		

5AMOC	Contributing to the Management of Change	1.5	Change Communicated to all Line Managers through Email	EV14		
5AMOC	Contributing to the Management of Change	1.5	Witness Testimony from Senior Performance Manager (Head of Operations at the time of this change) re. LO1	EV15		
5AMOC	Contributing to the Management of Change	2.1, 2.5	Induction Tracker to monitor change activities during implementation stage	EV16		
5AMOC	Contributing to the Management of Change	2.1	Request to receive notification of all new colleagues to track induction progress from the beginning.	EV17		
5AMOC	Contributing to the Management of Change	2.2	Stakeholder Mapping Exercise	EV18		
5AMOC	Contributing to the Management of Change	2.2, 2,4	Presentation delivered at Senior Leadership Team Meetings and District Performance Reviews to Key Stakeholders	EV19		
5AMOC	Contributing to the Management of Change	2.2	Email with questions for Senior Managers and Performance Leads re. Induction progress and reinforcing the requirement for change	EV20		
5AMOC	Contributing to the Management of Change	2.2	Meeting notes from Cardiff L&D Meeting evidencing induction communication and reinforcement of the need to follow the new process	EV21		
5AMOC	Contributing to the Management of Change	2.3	Google Hangout message sent to Senior Team to ask them to remind their teams of the importance of following the new induction and updating it weekly	EV22		
5AMOC	Contributing to the Management of Change	2.3	Email to Performance Lead, DPM and Head of Operations highlighting where the new process hadn't been followed and the impact of not following the process	EV23		
5AMOC	Contributing to the Management of Change	2.4	Questionnaire created for colleagues to provide feedback following their induction	EV24		
5AMOC	Contributing to the Management of Change	2.4	Email to managers re. feedback from colleagues about inductions not being updated from one month to next and colleagues not dialling into progress calls	EV25		
5AMOC	Contributing to the Management of Change	2.4	Suggestion from Senior Manager to be invited to all induction calls from month 2 to ensure progress was being made	EV26		
5AMOC	Contributing to the Management of Change	2.4, 3.1	Email to HR evidencing amendments to the induction programme to cater for 'Fast Track' employees	EV27		
5AMOC	Contributing to the Management of Change	2.5	Completed induction stored and capturing New Starter feedback	EV28		
5AMOC	Contributing to the Management of Change	2.5, 3.1	Summary of feedback questionnaire results evidence the capturing of both quantitative and qualitative data	EV29		
5AMOC	Contributing to the Management of Change	2.5	Updates to Senior Team Members re. positives / risks / focus for next quarter	EV30		

5AMOC	Contributing to the Management of Change	2.5	Email sent to Key Stakeholders with L&D meeting minutes attached (discussions included induction) & responses from Key Stakeholders to the support provided	EV31		
5AMOC	Contributing to the Management of Change	2.5, 3.3	Witness Testimony from Senior Performance Manager (Head of Operations at the time of this change) re. LO2 & LO3	EV32		
5AMOC	Contributing to the Management of Change	3.1	Email of appreciation in response to email re. impact of the new induction programme from Performance Lead	EV33		
5AMOC	Contributing to the Management of Change	3.1	Email from HR with request to share the induction with other Maximus businesses	EV34		
5AMOC	Contributing to the Management of Change	3.2	Induction feedback highlighting areas where we can still improve	EV35		
5AMOC	Contributing to the Management of Change	3.2	Revised National Induction Proposal	EV36		
5AMOC	Contributing to the Management of Change	3.2	Email to Managers rolling out revised national induction programme	EV37		
5AMOC	Contributing to the Management of Change	3.2	Induction plan revised for large scale recruitment and remote delivery	EV38		
5AMOC	Contributing to the Management of Change	3.3	Email sent to Key Stakeholders to communicate outcome of the change imitative	EV39		
5AMOC	Contributing to the Management of Change	3.4	CIPD New Profession Map – Core Area of Change	EV40		

Candidate declaration:

- I confirm that the work/evidence presented for assessment is my own unaided work.
- I have read the assessment regulations and understand that if I am found to have 'copied' from published work without acknowledgement, or from other candidate's work, this may be regarded as plagiarism which is an offence against the assessment regulations and leads to failure in the relevant unit and formal disciplinary action.
- I agree to this work being subjected to scrutiny by textual analysis software if required.
- I understand that my work may be used for future academic/quality assurance purposes in accordance with the provisions of the Data Protection Act 1998.
- I understand that the work/evidence submitted for assessment may not be returned to me and that I have retained a copy for my records.
- I understand that until such time as the assessment grade has been ratified through internal and external quality assurance processes it is not final.

Signature:	S Kelly	**Date:**	18/01/21

Personal Statement

1.1

Remploy Cymru was implementing a new contract whilst still continuing to deliver its existing contract with delivery of performance expected on both. Significant recruitment was taking place and December 2017 to September 2018 saw a 41% attrition rate of new colleagues (EV1). Senior Leadership indicated improvements were needed with colleague induction (EV2). The communication created a sense of urgency for the change to be initiated, mirroring Kotter's 1996 8-step change process (Hodges, 2016). Improving staff retention was the key internal driver for change. The communication highlighted that over half of colleagues left to pursue other opportunities; indicating that external competition could also have been considered a driver. Increased retention rates were highlighted as a change benefit (EV2). At Senior Leadership Team (SLT) meetings I regularly communicated change updates, highlighting the benefits of the new induction programme (EV3). CIPD (2020) confirm that an ineffective induction will impact on colleague retention. Aside from increased retention rates, the new induction would increase the likelihood of colleague success and enhance overall performance. Long term benefits would see a reduction in time and money spent on recruitment, induction and staff training.

1.2

The initial induction checklist highlights the different roles impacted (EV4). It was important that key stakeholders were identified. Kubler-Ross' Change Curve describes different stages that colleagues go through during change. The first is 'shock and denial' which is why communication around the rationale is so important. 'Anger and Blame' is next, where it's important to enable colleagues to have a voice and encourage dialogue (Hodges, 2016). No colleagues voiced disagreement with the rationale; however there were reservations around introducing a heavily structured programme that some felt was inflexible. ACAS (2010) discusses the importance of being honest and empathetic with colleagues.

New Colleagues would be impacted as it's their introduction to the business. Line Managers would be impacted as they facilitate inductions. Local team members would be impacted as they support with buddying and mentoring. Operational Trainers would be impacted as they would ensure the induction progresses effectively and training is provided. During this change; members of the Senior Team did support with necessary communication; however electing 'Change Champions' would have been an added benefit. Kotter (2017) describes how building an army of volunteers who can guide others is beneficial.

During times of uncertainty, good employee communication is crucial (CIPD 2020). Line Managers were all introduced to the new induction programme in informal sessions, allowing them to fully understand its purpose; how it's delivered; its benefits and the consequences of not delivering it. Additionally, one to one support was provided to Line Managers (EV5). Collaborative induction progress calls were in place to support with induction facilitation (EV6).

1.3

Time was the primary resource required. Due to my role; implementing the change was my responsibility and one of my key annual objectives (EV7). Colleagues' time was also required to

support with the design and induction content. Time had to be made available to support with this change as the Senior Team were fully aware of the expectations and that reducing attrition needed to be made a priority (EV2).

ACAS (2010) recommend that employees need to be involved from the start. Colleagues were individually contacted to request their time to support with change activities (EV8). Line Managers' time was required for training and to attend regular induction progress calls (EV6). Colleagues within local teams would also need to support with facilitation of the induction through buddying and mentoring (EV4). Colleague participation is invaluable during a change process by helping to reduce any fear and it builds trust (CMI, 2014).

1.4

Austin (2015) describes how creating a clear journey of where change will take the organisation with actionable goals makes the execution easier. A formal change plan wasn't created; however in hindsight this would have been a useful tool. I have devised a change plan retrospectively documenting key information (EV9).

The plan introduces the vision of improving staff retention with the objectives of creating a new induction programme; implementing and embedding it and gathering feedback to assess its effectiveness. The plan lists activities to achieve the main goal. A Gantt chart has been created to accompany the Change Plan (EV10). CIPD (2020) describe how effective project management ensures timings don't slip and the project delivers as planned.

The Change Plan highlights the justification for the change, key benefits, stakeholders that will be impacted along with the scope of the change. A communications strategy has been developed, highlighting how the change will be communicated to key stakeholders (EV11). Additionally, the Plan highlights the support provided; the resources required, along with how activities will be monitored and success measured.

1.5

The requirement to review induction was initially introduced at a SLT Meeting where we participated in a brainstorming session (EV12). The high attrition rate was highlighted as a risk and the Head of Operations ensured 'Induction' was on the agenda as there was already agreement that change was needed. The detail as to how to improve induction needed to be established and it was important that Senior Management participated to ensure buy-in. McNally (2019) discusses how it's important for senior colleagues to lead by example.

A further email from my Line Manager that attached my KPIs (EV7) confirmed agreement for the change to be initiated (EV13).

The plan for change was communicated during monthly SLT Meetings (EV3), training sessions and via email to Line Managers (EV14). Lewin's model of change describes how a compelling message delivered in a way that people can understand needs to be communicated during the 'Unfreezing Stage' (Mindtools, 2006). Creating a vision that colleagues want to be a part of, followed by effectively communicating that vision are key steps in Kotter's change process (MindTools, 2018).

The Head of Operations communicated to all the Senior Team that the change needed to be prioritised due to the high staff attrition rates and that I would be leading on that change (EV2).

A Witness Testimony is provided in support of Learning Outcome One (EV15).

Bibliography:

ACAS (2010) *How to manage change* [Online]. Available at: https://archive.acas.org.uk/media/2673/Advisory-booklet---How-to-manage-change/pdf/Acas-How-to-manage-change-advisory-booklet.pdf (Accessed: 15 Jan 2021).

AUSTIN, J. (2015) 'Leading Effective Change: A Primer for the HR Professional, *SHRM Foundation's Effective Practice Guidelines Series,* Aug 2015, pp.01 – 36. Available at: https://www.shrm.org/hr-today/trends-and-forecasting/special-reports-and-expert-views/Documents/Leading-Effective-Change.pdf (Accessed: 16 Jan. 21).

CIPD (2020a) *Change Management* [Online]. Available at: https://www.cipd.co.uk/knowledge/strategy/change/management-factsheet (Accessed: 15 Jan. 21).

CIPD (2020b) *Employee Communication* [Online]. Available at: https://www.cipd.co.uk/knowledge/fundamentals/relations/communication/factsheet (Accessed: 16 Jan. 21).

CIPD (2020c) *Induction* [Online]. Available at: https://www.cipd.co.uk/knowledge/fundamentals/people/recruitment/induction-factsheet#29869 (Accessed: 16 Jan. 21).

CMI (2014) *Implementing an Effective Change Programme* [Online]. Available at: https://www.managers.org.uk/wp-content/uploads/2020/03/CHK-040-Implementing_an_effective_change_programme.pdf (Accessed: 15 Jan. 21).

HODGES, J. (2016) *Managing and Leading People through Organisational Change.* London: Kogan Page.

KOTTER (2017) *The8-Step Process for Leading Change* [Online]. Available at: https://www.kotterinc.com/8-steps-process-for-leading-change/ (Accessed: 15 Jan. 21)

MCNALLY, E. (2019) *The ten impact essentials: A conversation with Elizabeth McNally* [Online]. Available at https://www.mckinsey.com/business-functions/transformation/how-we-help-clients/changing-trajectories/the-ten-impact-essentials-a-conversation-with-elizabeth-mcnally (Accessed: 15 Jan. 21).

MINDTOOLS (2018) *Kotter's 8 Step Change Model* [video]. Available at: https://www.youtube.com/watch?edufilter=NULL&v=xNILBjjVttA&ab_channel=MindToolsVideos (Accessed: 15 Jan 2021).

MINDTOOLS (2006) *Lewin's Change Management Model* [Online]. Available at: https://www.mindtools.com/pages/article/newPPM_94.htm (Accessed: 15 Jan 2021).

Remploy Cymru
Rhoi gallu yn gyntaf
Putting ability first

Gwaith ac Iechyd Rhaglen Cymru
Work and Health Programme Wales

Staff Retention

EV1

9

Recruitment & Induction Improvements

Prepared By: Sophie O'Kelly

Prepared for: WHP Provider Forum

Date: 17.02.2020

disability confident LEADER

Remploy mewn partneriaeth gyda MAXIMUS
Remploy in partnership with MAXIMUS

Why we made the change

- Process of significant organisational change
  - Implementation of new contract
  - Delivery & Performance expectations of two contracts
  - Gradual transition of existing colleagues on to WHP
  - Continuous period of training for the new contract
  - Increased contractual requirements
  - Significant period of recruitment
  - New Line Managers recruited
  - Dec 2017 – Sept 2018 – 41% Staff attrition rate.

Embedding & Learnings

- Line Manager culture change to adapt to a structured process
- Monitored closely from Day 1 to ensure process was being followed
- New Starter Feedback and Line Manager Feedback to gather effectiveness
- Improvements continuously made where required
- From Oct 2018 New Starter staff attrition rates have reduced to 16%
- 95% staff rated induction Good or Excellent

Remploy
Putting ability first

EV2

Sophie O'Kelly <sophie.new@remploy.co.uk>

FOR INFORMATION / ACTION - HR Info

[redacted] 7 March 2019 at 06:38
To [redacted] Sophie Okelly <sophie.new@remploy.co.uk>

Good morning all,

I have been doing a bit of work behind the scenes with [redacted] to look at some trends with our staffing / absence across Wales. This work is ongoing and is looking at recruitment, retention, salaries & sickness. I just wanted to share a snapshot that i received from [redacted] esterday around our leavers. The information below indicates that we need to get better at the front end piece including recruitment & induction. I have also asked Sophie to look at the induction format taking on board some of the comments raised over the last couple of weeks, we have discussed a few ideas and Sophie will present these at next week's SLT - the induction process is very important and has to be consistent, i would ask you to give it some thoughts between now and next week, come prepared with some suggestions or solutions - the content of the plan is not up for debate though. Thanks

- 29 leavers in total last 12 months Q1= 4 Q2= 10 Q3 = 10 Q4 = 5
- 13 or 44% of leavers have less than 6 months service which might indicate a need to improve job preview, interview assessment/fit or induction process
- 13 provided reasons for leaving – just over half stated better career opportunities as the primary reason , 5 gave pay as a secondary reason. Lack of growth opportunities, pressure , too much travel and clash with manager then all featured pretty equally.

Regards,

[redacted]

DC Leader.jpg

You can follow us on:

CONFIDENTIALITY NOTICE: This email, including attachments, is for the sole use of the intended recipients and may contain confidential and privileged information or otherwise be protected by law. Any unauthorised review, use, disclosure or distribution is prohibited. If you are not the intended recipient, please contact the sender, and destroy all copies and the original message.

Please consider the environment before printing this email.

Learning & Development Update

Remploy Cymru
Rhoi gallu yn gyntaf
Putting ability first

Gwaith ac Iechyd Rhaglen Cymru
Work and Health Programme Wales

Quarter 1	Positives	Areas of Risk	Focus for Quarter 2
Staff CV Workshops	• Attendee Contribution during the training • Commitment to learning • Taking on board new ideas • Putting learning into practice • Training feedback	• **Embedding** of learning • CVs not being uploaded to Adapt • Sample Checks/Feedback inconsistent	• File Check Feedback • L&D Meetings (quarterly) with PL/DPM • Random Sample Check
New Starter Inductions	• Supportive / Structured approach to inducting New Starters • Positive Feedback • New Starter more likely to be successful within role	• **Embedding** of Induction Plans • Time Allocated to Induction Plans and Learning	• L&D Meetings (quarterly) with PL/DPM • Random Sample Check • Induction Feedback at 3 months
Apprenticeships	• Engagement Survey • Offering Development Opportunities to staff • Promoting staff development	• Unknown • Learners are supported • Minimal impact on the business	• Apprenticeships sign ups • Managing the process

Other areas of focus for Quarter 2:

- MAPPA Training
- PL File Check Training
- Exits Training
- CV Workshop training for new starters
- Employee Exit Feedback

EV3

Week 1

Day 1 - Overview, Essentials and Introductions

- Local Induction with Performance Lead (ES) (FT)
- Branch Tour (ES) (FT)
- History of Remploy **(see useful links tab)** (ES)
- Organisation Charts **(see tabs below)** (ES)
- Useful Contact Phone Numbers **(see Org Charts)** (ES) (FT)
- Setting up of equipment (phone, laptop, portable scanner and printer if applicable) (ES) (FT)
- Team Introductions (ES) (FT)
- Introduction Call with Sophie O'Kelly **(Contact Sophie to arrange call - contact details on Wales Org Chart)** (ES) (FT)

Day 2 - Policies and Processes

- Master Policies **(see useful links tab)** (ES)
- Expenses Policy (ES) (FT)
- Driving on Company Business (ES) (FT)
- Safeguarding **(See Org Chart for Nominated Safeguarding Lead)** (ES) (FT)
- Health and Safety (ES) (FT)
- Quality Matters (ES) (FT)
- Team Talk Cymru (ES) (FT)

Day 3 - Important Things to Know

- Adapt Login - Quick Overview (FT)
- Google Login - Email Signature (ES) (FT)
- Introduction to Learning Academy (ES) (FT)
- Overview of Remploy Online (ES)
- The Role, KPIs and Metrics (ES)
- Cascade, Ignite and Expenses (ES)
- Links to Cohort Simplifier, Mi Portal and WHP Dashboard **(see useful links tab)**

Adapt Training Log In
Username: Training10
Password: Remploy10

Day 4 - Start Observations

- Observation: Customer Coordinator (ES)
- Overview of Referral Process (ES)
- Welcome Phone Calls
- How to log communication, send out Welcome Pack & book profile appointment
- Petty Cash process
- Observation: EA (Initial Appointments) (ES) (FT)

Week 2

Day 1

- Introduction to Regional Account Manager (ES)
- Overview of Account Manager Role (ES)
- Overview of Accounts / Pre Employ **(see useful links tab)** (ES)
- Adding Vacancies / Work Placements / Submissions
- Observation: Initial Appointments (ES) (FT)
- Observation: Development Session (ES)

Day 2

- Introduction to Parntership Advisor (ES)
- Overview of Community Partnership Network (ES)
- Introduction to Mi App - How to make referrals and complete interventions
- Observation: Job Action Group Session (ES)
- Contact Local Employers (ES)

Day 3

- WHP Contract Training (ES) (FT)
- WHP Contract Performance Training (ES) (FT)
- WHP LTU Participant Training (ES)
- **(See useful links tab to access all the above)**

Day 4

- Conduct Live Initial Appointments with Support (FT)
- Update Adapt during Initial Appointment Sessions (FT)
- Introduction to Customer Service Standards Report (see useful links tab) (FT)
- Introduction to Cohort Simplifier **(see useful links tab)**

Day 5

- Introduction to Remploy Online Advisor and Online Support Available (see useful links tab) (ES)
- Conduct Live Initial Appointments with support (FT)
- Update New Starter Induction Checklist with Performance Lead (ES)
- DPM Catch Up Call (ES)

Week 2 Academy Learning

- HS003 – Display screen equipment (DSE) (Workrite) (ES)
- DB006 – Learning disabilities (ES)
- DB007 – Mental health awareness (ES)
- IS001 – Ignite performance (ES)

EV4

Week 4

Day 1

- Disability Awareness **(see useful links tab)** (ES)
- Conduct Initial Appointments / Work First Appraisals/Job Action Groups/Development Sessions (FT)
- File Checks/CMO Audit Questions

Day 2

- JCP / Work Coach Visit (ES)
- Complete CV for Participant
- Performance Lead to feedback on CV quality

Day 3

- Overview of WHP Dashboard
- Overview of MI Portal
- Overview of CSS Report (FT)
- Cohort Simplifier Training

Day 4

- Observe Caseload Review (ES)
- Performance Lead to observe a profile appointment (FT)
- DPM Catch Up Call (ES)

Day 5

- Reflection/Thoughts on month 1 with Performance Lead (ES)
- Update New Starter Induction Checklist with Performance Lead (ES)
- KPIs for month 2 (ES)
- End of First Month Call with Sophie O'Kelly (ES)

Week 4 Academy Learning

- HS005 - Manual Handling (ES)
- HS001 - Personal Safety (ES)
- CM009 - Anti Radicalisation & Extremism (prevent) course (ES)

Remploy
Putting ability first

EV5

Sophie O'Kelly <sophie.new@remploy.co.uk>

[redacted]

1 message

[redacted] 12 October 2018 at 14:37

To: [redacted]
Cc: Sophie O'Kelly <sophie.new@remploy.co.uk>

Hi [redacted]

[redacted] is starting on Monday, I've asked her to come into the [redacted] Branch to meet you.

Sophie, can you please support [redacted] in relation to the new induction schedule.

Many thanks

[redacted]

[redacted]

[redacted]

Mobile: [redacted]

Website: www.remploy.co.uk

 DC Leader.jpg

You can follow us on:



CONFIDENTIALITY NOTICE: This email, including attachments, is for the sole use of the intended recipients and may contain confidential and privileged information or otherwise be protected by law. Any unauthorised review, use, disclosure or distribution is prohibited. If you are not the intended recipient, please contact the sender, and destroy all copies and the original message.

Please consider the environment before printing this email.

EV6

× Sophie to contact [redacted] (Llanelli) Day 1 Save More actions

4 Feb 2019 to 4 Feb 2019

All day Doesn't repeat RSVP: Yes Add note/guests

Event Details Find a Time Guests Rooms

Add Google Meet video conferencing Add guests

Add location

Notification 1 days before at 23:50 ×

Add notification 3 guests

3 yes

Sophie Okelly

Organiser

[redacted]

[redacted]

Sophie O'Kelly

Free Default visibility

Guest permissions

Modify event

Invite others

See guest list

B I U

Hi Both
Just to let you know I will be contacting [redacted] on her first day to introduce myself and explain a little bit further about the induction process.
If there is anything specifically you need from me to support with her induction process please let me know
Thanks
Sophie

× Sophie to Call [redacted] Day 1 (W Save More actions

19 Feb 2019 11:30 to 12:00 19 Feb 2019 Time zone

All day Doesn't repeat RSVP: Yes Add note/guests

Event Details Find a Time Guests Rooms

Add Google Meet video conferencing Add guests

Add location

Notification 10 minutes ×

Add notification 2 guests

2 yes

Sophie O'Kelly

Organiser

[redacted]

SUGGESTED TIMES

Sophie O'Kelly

Busy Default visibility

Guest permissions

Modify event

Invite others

See guest list

B I U

Hi [redacted]
I'll call you, [redacted] and [redacted] on Day 1 to introduce myself, explain my role and give an overview of the New Starter Induction Plan.
Thanks
Sophie

[redacted] End of Month 1 Induction Call

Save | More actions

4 Mar 2019 16:00 to 16:30 4 Mar 2019 Time zone

All day | Doesn't repeat

RSVP: Yes | Add note/guests

Event Details | Find a Time

Guests | Rooms

Join with Google Meet

meet.google.com/wuk-cnec-igt

Add guests

Add location

Notification 10 minutes

Add notification

3 guests
2 yes, 1 awaiting

Sophie O'Kelly
Organiser

[redacted]

[redacted]

Sophie O'Kelly

SUGGESTED TIMES

Busy | Default visibility

Guest permissions

- [ ] Modify event
- [x] Invite others
- [x] See guest list

Hi Both
I am booking in this call as [redacted] will have been in the business for 1 month by this stage.
This will be an opportunity for you both to feedback on how her induction has gone as ideally the Induction Checklist will be signed off by this stage.
Thanks
Sophie

End of Month 1 Induction Call - [redacted]

Save | More actions

18 Mar 2019 13:30 to 14:00 18 Mar 2019 Time zone

All day | Doesn't repeat

RSVP: Yes | Add note/guests

Event Details | Find a Time

Guests | Rooms

Add Google Meet video conferencing

Add guests

Add location

Notification 10 minutes

Add notification

3 guests
2 yes, 1 awaiting

Sophie O'Kelly
Organiser

[redacted]

[redacted]

Sophie O'Kelly

SUGGESTED TIMES

Busy | Default visibility

Guest permissions

- [ ] Modify event
- [x] Invite others
- [x] See guest list

Hi Both

As discussed this morning, I will be calling you both at the end of month 1 to check progress of your induction.
If either of you have any question or need any support in the meantime please give me a call at any time
Thanks

Sophie

EV7

Remploy Cymru | Work and Health Programme Wales

KPI's & Objectives 2018 / 2019

Name:	Sophie O'Kelly	Date Agreed:	12th November 2018

KPI's	
1	Ensure a robust induction plan is embedded for new staff at all levels that join the business. Agreed periodic contact with Performance Leads & New Starter in line with the induction plan to be completed. Induction training evaluation questionnaire to be devised and introduced at the 3 month stage scoring mechanism to be agreed, target to achieve X% "Green".
2	Review and update all current training materials every 6 months. Existing modules to be used as a measurement mechanism: • CV Workshop • Contract Training • SOP's
3	Training & Learning session to be delivered to all members of the Senior Leadership team on a quarterly basis. Focus on the sessions completed in the previous quarter along with the requirements and session for the next quarter. 4 sessions to be delivered in year in total.
4	Quarterly meetings to be arranged with each of the Performance Leads to review the branch L & D plans. 10% dip sampling to be completed on staff learning objectives, findings to be recorded and shared with District Performance Managers as part of KPI 3. Invitations to be sent for the year ahead before end of December 2018.
5	Bi-Monthly meeting with [redacted] to discuss & agree areas of focus for next quarter and findings from previous quarter. Meeting to include dip sampling of participant records to ensure training delivered has been embedded. Mechanism to be prepared to record findings, feedback to be shared with District Performance Managers as part of KPI 3.
6	70% completion of exit interview questionnaire to be completed with all staff exiting the business.

Objectives	
1	Mandatory e-learning / PowerPoint presentation to be created for new staff to review as part of the induction process. This will provide them with a basic overview of the contract and will act as pre-cursor to the SOP's & Systems session that will be delivered later in the induction phase.
2	Formal agendas to be created for the following: • Quarterly meetings with Performance Leads – KPI4 • Bi-Monthly Meeting with [redacted] – KPI5
3	Calendar of L & D events to be set up for the next 12 months. 1 per quarter required, consideration to be given to Action Plans (Q1) & Exit Reports (Q2). Q3 & Q4 to be agreed in line with the feedback from KPI 3 to KPI6
4	Design & Implement a robust exit interview process – questionnaire to be developed and issued to all members of staff at the point the letter of resignation is received.

Remploy in partnership with MAXIMUS | jobcentreplus | disability confident

Remploy
Putting ability first

EV8

Sophie O'Kelly <sophie.new@remploy.co.uk>

New Starter Induction Plan

Sophie O'Kelly <sophie.new@remploy.co.uk>
To: [redacted]

4 September 2018 at 09:30

Hi [redacted]

Hope you're well.

Shall we put a call in the diary to discuss what our plan is with this?

I know you have already started it which is fab but just wanted to make sure we put some time in the diary to work on it to ensure am I in a position to roll it out to the rest of the region in October.

I know you have your DPR today. I have some time tomorrow or Thursday morning for a call. This any good?

Thanks

Sophie

--

Sophie O'Kelly
Regional Support Business Manager

Putting Ability First / Rhoi Gallu yn Gyntaf
Remploy Ltd

Mobile / Ffôn Symudol: 07789 171688

Alexandra House / Ty Alexandra

Alexandra Road / Heol Alexandra

Swansea / Abertawe

SA1 5ED

www.remploy.co.uk

Remploy
Putting ability first

EV8

Sophie O'Kelly <sophie.new@remploy.co.uk>

Accepted: RAM New Starter Induction Plan @ Mon 22 Oct 2018 11:00 - 12:00 (BST) (Sophie O'Kelly)

1 message

[redacted]
Reply-To: [redacted]
To: sophie.new@remploy.co.uk

16 October 2018 at 15:56

[redacted] **has accepted this invitation.**

RAM New Starter Induction Plan

Hi Both

I'm in Swansea on this date, any chance we can grab an hour to brainstorm some ideas for this?

I'll put it into a plan following our meeting but your ideas would be greatly appreciated with the content.

Thanks

Sophie

When	Mon 22 Oct 2018 11:00 – 12:00 United Kingdom Time
Where	Remploy, House a Swansea Foyer, 34 Alexandra Rd, Swansea SA1 5ED, UK (map)
Calendar	Sophie O'Kelly
Who	• Sophie O'Kelly- organiser • [redacted] • [redacted]

Invitation from Google Calendar

You are receiving this email at the account sophie.new@remploy.co.uk because you are subscribed for invitation replies on calendar Sophie O'Kelly.

To stop receiving these emails, please log in to https://www.google.com/calendar/ and change your notification settings for this calendar.

Forwarding this invitation could allow any recipient to modify your RSVP response. Learn More.

CONFIDENTIALITY NOTICE: This email, including attachments, is for the sole use of the intended recipients and may contain confidential and privileged information or otherwise be protected by law. Any unauthorised review, use, disclosure or distribution is prohibited. If you are not the intended recipient, please contact the sender, and destroy all copies and the original message.

Please consider the environment before printing this email.

invite.ics
1K

EV9

Change Plan

Created by	Sophie O'Kelly

Vision and Objectives
Vision: To improve staff retention rates through the introduction of a structured and supportive induction programme for new colleagues joining the business. **Objectives:** • To design a robust induction programme for new colleagues. • To implement & embed the induction programme within the region. • To gather feedback to assess the effectiveness of the induction programme.
Activities to achieve objectives *(attach Gantt chart)*
• Initial Brainstorming Session • Induction Programme Design • Training Roll-Out • Implementation of new Induction programme • Monitoring of Progress • Feedback Evaluation • Continuous improvements *Nb. Gantt Chart Attached*
Business case *(evidence-based - include data, benefits of change, gap analysis – difference between current and future states, issues and risks)*
From December 2017 to September 2018, 41% of colleagues left the business within 6 months of joining. This highlights that there is a significant risk at the beginning of the employee journey. There is a need to review the current induction initially. Following this, a new consistent, structured and supportive induction needs to be designed and embedded. The benefits to an enhanced induction programme will be a reduction in staff attrition, improved likelihood of individual success in role, increased individual and overall performance and a reduction in time and money spent on recruitment, induction and training long term.
People affected *(stakeholders – employees, particular employees, customers, shareholders)*
• New employees • Line Managers • Senior Managers • Local colleagues that will provide buddying support and mentoring • Performance Improvement Manager
Scope of change *(eg one site, one product group)*
Initially this will be introduced across Wales and will impact all areas offering one consistent approach.
Roles *(project manager, sponsor, team members)*
Project Manager – Sophie O'Kelly Project Sponsor – Head of Operations Team Members – Senior Leadership Team
Communication strategy *(attach communication plan, list of change champions)*
See attached communications strategy.
Support to be offered (*advice, counselling, coaching, mentoring, representation, training - attach, for example, a training plan)*
Training will be provided to all Line Managers during initial roll-out. Further 1:1 ad-hoc support

can be provided at request. Performance Improvement Manager will support Line Managers to facilitate all day one induction calls and monthly progress calls thereafter.
Timings and milestones *(see Gantt chart)*
Refer to attached Gantt Chart for timings and milestones.
Resources required, including cost *(equipment, time, people, materials, guidance)*
The main resource required will be time but primarily the time of Performance Improvement Manager who is also Managing the project. Colleagues will be involved sporadically throughout the process. Project Manager Costs @ 2 days per week for 5 months (up to monitoring stage) = £ 5,076.92
Monitoring activities
Induction Feedback questionnaire to be distributed to colleagues following completion of induction. Monthly progress calls to take place with Line Manager and New Starter. Random sample induction checks to take place at Quarterly L&D reviews.
Success Measures
Positive colleague feedback and an improved staff retention rate.

Induction Deliverable Timeline

Priorities	Aug	Sept	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sept
Brainstorming Session	→													
Design		→	→											
Training Roll-Out			→											
Implementation				→	→									
Monitoring & Assessment						→	→	→	→	→	→	→	→	→

EVIO

EVII

Communications strategy	
Company Profile	Remploy in Wales is operated by Maximus employing over 100 employees working on its WHP and IPES contracts. The majority of the workforce is Employment Advisors; however the workforce also consists of Performance Leads, Account Managers, Customer Coordinators, Partnership Advisors, Operations Managers and other roles within the senior team; all overseen by the Regional Contracts Director.
Issue	The number of colleagues leaving the business within 6 months of joining is a huge risk to the organisation.
Research	Statistics have proven that 41% of colleagues between December 2017 and September 2018 left within 6 months of joining the business.
Communications Objectives	• To highlight the need for change by discussing current risks and future benefits • To ensure Line Managers 'buy in' to what we aim to achieve. • To influence those who may be resistant to change.
Audiences	• Head of Operations • Senior Managers • Performance Leads
Key Messages	We need to improve staff retention and recent statistics evidence that our highest area of risk is during a colleague's probationary period. There is a need to review what our current induction process looks before designing and embedding a new, enhanced supportive induction process for you as Line Managers and your new team members. The aim is to improve staff attrition rates, provide new starters with a better introduction to the business which will increase the likelihood of success in the role and in turn improve individual and overall performance. Longer term, time and money will be saved on recruitment, induction and training.
Tactics/Channels	1. Involve the Senior Leadership Team in the design and content of the Induction Programme to gain buy in. 2. Roll-Out Training/Information sessions with Performance Leads to highlight the support that will be provided to them along with the benefits of the new induction. 3. Monthly progress updates to provide feedback to Senior Leadership Team.
Risks	The risks that we may encounter will be that

	colleagues will not buy in to the new induction programme. If this happens and it's not used then we will continue to see high attrition rates. All Line Managers need to utilise the new induction programme efficiently in order for us to be able to assess its effectiveness.
Measurement	Colleague surveys to be completed following induction to provide feedback. Staff Attrition rates to be reduced.
Review	Performance Improvement Manager to facilitate day 1 induction calls with all Line Managers and new starters followed up with monthly calls to check progress of induction. Random induction samples to be checked at quarterly Learning & Development reviews with Line Managers. Induction feedback to be reviewed and improvements discussed with Line Managers

EV12

Remploy
Putting ability first

Wales Senior Team Meeting Agenda

Date: Wednesday 22nd August 2018
Time: Arrival 09.30am for 09.45am Start with approx. 5.15pm Finish
Location: Wrexham Office
Dress Code: Business Dress

Attendees: [redacted] Sophie O'K [redacted]

Guests [redacted]

Apologies

AGENDA

09.30 – 09.45	**Arrival and Coffees**	**All**
09.45 – 10:15	**Review Actions from last meeting**	**?**
10.15 – 10.45	[redacted]	[redacted]
10.45 – 11.15	[redacted]	[redacted]
11.15 – 11.30	**BREAK**	
11.30 – 12.30	**Training and Inducting**	**SO**
12.30 – 13.00	[redacted]	**ALL**
13.00 – 13.30	**LUNCH**	
13.30 – 14.00	[redacted]	[redacted]
14.00 – 15.00	[redacted]	[redacted]
15.00 – 15.30	[redacted]	[redacted]
15.30 – 16.15	[redacted]	**All**
16.15 – 17.00	[redacted]	**All**

AOB Items

Remploy
Putting ability first

EVI3

Sophie O'Kelly <sophie.new@remploy.co.uk>

KPI' & Objectives 2018 / 2019

[redacted]> 13 November 2018 at 12:25
To: Sophie Okelly <sophie.new@remploy.co.uk>
Cc: [redacted]>

Hi Sophie,

Thanks for your time yesterday, as agreed please find attached a copy of the KPI's & Objectives we discussed / agreed yesterday. Please review and confirm you are happy with the content. I will then arrange to add to Cascade. Thanks

Regards,

[redacted]

Mobile: [redacted]

Website: www.remploy.co.uk

DC Leader.jpg

You can follow us on:

CONFIDENTIALITY NOTICE: This email, including attachments, is for the sole use of the intended recipients and may contain confidential and privileged information or otherwise be protected by law. Any unauthorised review, use, disclosure or distribution is prohibited. If you are not the intended recipient, please contact the sender, and destroy all copies and the original message.

Please consider the environment before printing this email.

Remploy WHP - KPI's & Objectives - Sophie O'Kelly - 2018 to 2019.docx
111K

Please consider the environment before printing this email.

EV14

On Wed, 5 Dec 2018 at 17:13, Sophie O'Kelly (via Google Sheets) <drive-shares-noreply@google.com> wrote:

Sophie O'Kelly has invited you to **edit** the following spreadsheet:

Wales EA New Starter Induction Checklist (Dec 2018)

Hi All
I'm sharing a copy of the latest EA New Starter Induction Checklist - RAM and PL updated versions coming soon.
Organisation charts are now up to date with the latest changes.
Useful Links tab has been updated with links to the mCohort Simplifier, Dashboard, Pre-Employ Presentation, 12 week Cycle Documentation and Remploy Online Desk Aid.
I have also recently updated the training presentations for WHP Contract Overview Training, Contract Performance Training and LTU training. Where I have delivered this to groups in the past, I think it's really important that colleagues go through these presentations within the first 4 weeks with us and that isn't always possible in a group environment. So, links have been added to the useful links tab so that colleagues can access the latest versions of these training sessions during their 4 week induction in their own time.
SOPs Training has been taken out of the 4 week induction - it is important you notify me when a colleague needs to be booked on to a training session but this will take place later on in their probation period.
I cannot stress the importance of you ensuring all colleagues are given a copy of this induction and that you check progress weekly before signing off at month 4 and uploading to Cascade. If anyone needs any additional support, please contact me.
This will form part of the agenda for the Quarterly L&D Meetings that will be taking place from January.
Please remember to make a copy for each individual (don't update this one)
Thanks all
Sophie

Open in Sheets

Google Sheets: Create and edit spreadsheets online.
Google LLC, 1600 Amphitheatre Parkway, Mountain View, CA 94043, USA
You have received this email because someone shared a spreadsheet with you from Google Sheets.

Google

CONFIDENTIALITY NOTICE: This email, including attachments, is for the sole use of the intended recipients and may contain confidential and privileged information or otherwise be protected by law. Any unauthorised review, use, disclosure or distribution is prohibited. If you are not the intended recipient, please contact the sender, and destroy all copies and the original message.

Please consider the environment before printing this email.

EV15

Student Name:	Sophie O'Kelly
Course:	CIPD HR
Witness Name:	Paul Lewis
Position:	Senior Performance Manager (Was Interim Head of Operations)
Relationship to Student:	Line Manager (at the time of the event)

Learning Outcome – Be able to plan for the implementation of change processes within an organisation			
I have read the submissions in respect of the Learning Outcome above and I can confirm that Sophie's evidence, actions and information are authentic and accurate. Having worked closely and supported Sophie during the project referenced, Sophie was instrumental in the managing the project from start to finish. Her key strengths were communication, research and organisation – welcoming and embracing stakeholder feedback from all levels to ensure the project took into consideration the requirements of all those involved as well as liaising with departments like HR to fully understand the extent of the issue before agreeing the required objectives. As with any change programme, you will receive negativity but Sophie's tenacity and passion for driving the project couple with selling the benefits for change, helped changed the mind set and allowed the project to successfully achieve a successful outcome.			
Signed:	Paul Lewis	**Date:**	17/1/2021

Personal Statement

2.1

Lawler & Mohram (2003, cited in Armstrong, 2016) discuss how most change initiatives fail due to poor implementation. Tracking the change process was vital in ensuring all activities were monitored and delivered on time. A Gantt chart evidences the key stages of the change process and the timescales to be achieved (EV10). Austin (2015) discusses how using project management best practices are best for change to be implemented effectively. An Induction Tracker was developed to monitor progress (EV16). Notification of all new colleagues joining the business was received to be able to monitor their progress immediately (EV17). The tracker monitored that inductions were shared; that welcome calls took place and that monthly progress calls continued thereafter. All progress calls were sent to both Line Managers and New Colleagues by diary invite (EV6). Following completion of the induction, a survey was sent to the colleague for feedback. The tracker recorded that the feedback had been requested, completed, returned and reviewed.

2.2

A Stakeholder Mapping Exercise to determine the appropriate level of communication wasn't completed at the time; however this has now been completed retrospectively (EV18). Stakeholders will be interested and/or influential in the change and are vital for effective implementation (Austin, 2016).

Communication was listed as the most effective method to engage employees in McKinsey's 2017 survey (Maor et al, 2017). At monthly SLT meetings, I provided Senior Managers with change updates and the need for change, the vision and benefits were continuously reinforced (EV19). The same presentation was delivered to Line Managers at District Performance Reviews. If I couldn't attend, I would still ensure any concerns were highlighted to reinforce the need for change and the consequences of not implementing the change (EV20). I facilitated quarterly Learning & Development Meetings with Line Managers to check induction progress and discuss feedback. The importance of following the process was discussed and documented and followed up with actions (EV21).

2.3

Trust is crucial to build and maintain positive relationships; earned through demonstrating competence and integrity (CIPD, 2020). Colleagues' reactions were anticipated and we understood that colleagues needed support to change their mind-sets through training, communication and supportive processes. McKinsey's Influence Model describes how colleagues need to see their Leaders behave differently; be given the skills and knowledge; have clear expectations and processes that support the change (Keller & Schaninger, 2019).

During the 'Change' stage of Lewin's model, it's important to resolve any uncertainty where colleagues aren't accepting (Mindtools, 2006). There was some resistance; but no conflict or refusal to accept the change. Further advice from Senior Leadership would've been sought in this instance. There were occasions where it became apparent the process wasn't being followed. To resolve this, I asked the Senior Team to reinforce the importance of implementing the change (EV22). There were occasions where I had honest conversations about the impact of not following the new process

and reinforced the justification for the change (EV23). Kubler-Ross' change curve describes this as the 'Confusion and Resignation' state and it's important that positive actions needing to be taken in future are reinforced (Hodges, 2016).

2.4

ACAS (2010) describes taking regular temperature checks as important. A survey was created to capture colleague feedback (EV24). The data was analysed and feedback was provided to stakeholders (EV19). One colleague stated that they felt the induction programme would be a great tool if Managers used it. This comment was highlighted to stakeholders, as its powerful evidence of the impact of not following the process.

Some feedback evidenced that Line Managers weren't reviewing inductions and there were occasions where colleagues didn't dial into progress calls. A communication was sent to all line managers to highlight this, and again reinforced the reason for the change (EV25). Consequently, a Senior Manager requested an invitation on to all calls from month two, which was fantastic evidence of a Leader championing the change (EV26).

We were reaching the 'Acceptance and Problem Solving' stage of Kubler-Ross' change curve where ideas for further enhancement were being discussed (Hodges, 2016). Line Managers felt the process was too inflexible and the autonomy to allocate caseloads sooner was requested for colleagues with sector experience. This was negotiated and the induction was amended to allow for experienced colleagues to be 'Fast Tracked'; as long as they had achieved the minimum criteria and were only allocated a small caseload (EV27). This is the process of 'Removing Obstacles' in Kotter's change process where action was taken to increase acceptance of the change (Mindtools, 2007).

2.5

Following the completion of a colleague induction; the induction programme is reviewed, both the colleague and Line Manager provide qualitative feedback and a copy is maintained (EV28).

The Induction Tracker is updated continuously to track progress (EV16). Leaver data is recorded on the tracker to monitor retention figures as this is a key outcome in establishing the success of this change.

A survey is sent to colleagues following completion of their induction (EV25). This feedback provides both quantitative and qualitative data for review. When gathering employee's views the best approach is a mixed approach of quantitative and qualitative methods as both have different strengths (CIPD, 2019). Reports can be extracted allowing us to analyse the data (EV29). Assessments ensure the change objectives are at the forefront and success or failure is not determined too early (Austin, 2015). This feedback was used to update Key Stakeholders at Senior Team Meetings, outlining what was working well; areas of risk and the focus moving forward (EV30). Kotter's change model discusses the importance of setting 'quick wins'. All successes along the way were communicated however on reflection, what may have enhanced this process further would've been to have built some tangible short term goals into the plan i.e. 'reduce attrition rate by 10% by x date' (Mindtools, 2007).

All meeting notes from quarterly L&D meetings were documented and actions set (EV21). Following the meetings these were sent to all key stakeholders (EV31).

A Witness Testimony is provided in support of Learning Outcome Two (EV32).

Bibliography:

ACAS (2010) *How to manage change* [Online]. Available at: https://archive.acas.org.uk/media/2673/Advisory-booklet---How-to-manage-change/pdf/Acas-How-to-manage-change-advisory-booklet.pdf (Accessed: 16 Jan. 21).

ARMSTRONG, M. (2016) *Armstrong's Handbook of Strategic Human Resource Management.* 6th edn. London: Kogan Page.

AUSTIN, J. (2015) 'Leading Effective Change: A Primer for the HR Professional, *SHRM Foundation's Effective Practice Guidelines Series,* Aug 2015, pp.01 – 36. Available at: https://www.shrm.org/hr-today/trends-and-forecasting/special-reports-and-expert-views/Documents/Leading-Effective-Change.pdf (Accessed: 16 Jan. 21).

CIPD (2020) *Change Management* [Online]. Available at: https://www.cipd.co.uk/knowledge/strategy/change/management-factsheet (Accessed: 16 Jan. 21).

CIPD (2019) *Employee Engagement and Motivation* [Online]. Available at: https://www.cipd.co.uk/knowledge/fundamentals/relations/engagement/factsheet#6235 (Accessed: 16 Jan. 21).

HODGES, J. (2016) *Managing and Leading People through Organisational Change.* London: Kogan Page.

KELLER, S. & SCHANINGER, B. (2019) 'Getting Personal about Change', *McKinsey Quarterly,* August 2019. Available at: https://www.mckinsey.com/business-functions/organization/our-insights/getting-personal-about-change (Accessed: 16 Jan. 21).

MAOR, D., REICH, A. & YOCARINI, L. (2017) 'The Power of People Transformations', *McKinsey & Company,* Feb 2017. Available at: https://www.mckinsey.com/business-functions/organization/our-insights/the-people-power-of-transformations (Accessed: 16 Jan. 21).

MINDTOOLS (2006) *Lewin's Change Management Model* [Online]. Available at: https://www.mindtools.com/pages/article/newPPM_94.htm (Accessed: 15 Jan 2021).

MINDTOOLS (2007) *Kotter's 8-Step Change Model* [Online]. Available at: https://www.mindtools.com/pages/article/newPPM_82.htm (Accessed: 16 Jan. 21)

EV16

Wales - Induction Tracker

File Edit View Insert Format Data Tools Add-ons Help Last edit was seconds ago

	First Name	Last Name	Start Date	Location	Induction Plan Shared	Day 1 Call	One Month C	Two Month Ca	Induction Feedback Form: Sent	Induction Feedback Form: Received	Induction Feedback Form: Feedback Reviewed
54	[redacted]	[redacted]	8/4/19	REM Cardiff Branch	☑	☑	☑	N/A	☑	☑	☑
55	[redacted]	[redacted]	2/4/19	REM Swansea Branch	☑	☑	☑	☑	☑	☑	☑
56	[redacted]	[redacted]	1/4/19	REM Ebbw Vale	☑	☑	☑	☑	☑	☑	☑
57	[redacted]	[redacted]	1/4/19	REM Bridgend	☑	☑	☑	☑	☑	☑	☑
58	[redacted]	[redacted]	1/4/19	REM Bridgend	☑	☑	☑	☑	☑	☑	☑
59	[redacted]	[redacted]	1/4/19	REM Llanelli	☑	☑	☑	☑	☑	☑	☑
60	[redacted]	[redacted]	25/3/19	REM RCT Porth Office	☑	☑	☑	☑	☑	☑	☑
62	[redacted]	[redacted]	18/3/19	REM Ebbw Vale	☑	☑	☑	☑	☑	☑	☑
63	[redacted]	[redacted]	18/3/19	REM Tredomen	☑	☑	☑	☑	☑	☑	☑
64	[redacted]	[redacted]	18/3/19	REM Llanelli	☑	☑	☑	N/A	☑	☑	☑
65	[redacted]	[redacted]	18/3/19	REM Swansea Branch	☑	☑	☑	☑	☑	☑	☑
66	[redacted]	[redacted]	11/3/19	REM Cardiff Branch	☑	☑	☑	☑	☑	☑	☑
68	[redacted]	[redacted]	25/2/19	REM Tredomen	☑	☑	☑	☑	☑	☑	☑

Remploy
Putting ability first

EV17

Sophie O'Kelly <sophie.new@remploy.co.uk>

New Starter Notifications

[redacted]> 29 November 2018 at 11:41

Cc: Sophie Okelly <sophie.new@remploy.co.uk>

Good morning [redacted]

Thanks for your time this morning, the team found it really beneficial.

We forgot to ask, please can you notify Sophie O'Kelly with the details of any new starters as she will then roll out the individual induction plans.

Also, could you send us an example of the questionnaire you use when staff leave the business? Thanks

Regards,

[redacted]

Mobile: [redacted]

Website: www.remploy.co.uk

DC Leader.jpg

You can follow us on:

CONFIDENTIALITY NOTICE: This email, including attachments, is for the sole use of the intended recipients and may contain confidential and privileged information or otherwise be protected by law. Any unauthorised review, use, disclosure or distribution is prohibited. If you are not the intended recipient, please contact the sender, and destroy all copies and the original message.

Please consider the environment before printing this email.

EVI8

Stakeholder Mapping Worksheet

Stakeholder Influence/Interest Matrix

For each key stakeholder, characterize them using the following stakeholder influence grid.

Influence		Low	High
	High	Keep Satisfied	Key Players
	Low	Minimal Effort	Keep Informed

Level of Interest

Stakeholder Grouping

Using the Stakeholder Influence/Interest Matrix, complete the table below. This will help determine stakeholder's grouping for change communications.

Stakeholder Name	Influence Level	Level of Interest	Stakeholder Grouping
Head of Operations	High	High	Key Players
Senior Managers	High	High	Key Players
Performance Leads	High	High	Key Players
HR	High	High	Key Players
Key Workers	Low	High	Keep Informed

©2019 Society for Human Resource Management

Staffing

- 15 New Starters in Wales since October 2018
- Additional 5 positions filled with start dates for this month
- Ongoing Recruitment - Additional 6 vacancies in the region
- New Starter Induction Checklist created to provide consistency and reduce Staff Turnover.

Risks	Solutions
• Staff Turnover • New Starter Induction Inconsistency • Induction Checklists being shared part way through induction • Manager Catch Up Meetings Adhoc • Caseloads prior to completion of Induction • Gaps missing in terms of using the system • Contract Training / ELearning not being completed • Policies not being discussed/shown	• Process to be more robust/ Managing more Closely • Induction checklist allocated in advance • Day 1 Calls/End of Month 1 Calls booked in advance – manager to be on the calls • Weekly catch ups to be in the diary from day 1 • Feedback gathered at every stage • Caseloads not to be given ahead of completion of Induction • Share New Induction with all Employees

Induction Checklist - Employee Feedback:

" In my experience, Management do not use this document to its full potential, if they did then it would be a very useful tool."

E/1a

Remploy
Putting ability first

EV20

Sophie O'Kelly <sophie.new@remploy.co.uk>

Question to cover at DPRs in North and DDA please

Sophie O'Kelly <sophie.new@remploy.co.uk> 1 March 2019 at 10:38
To: [redacted]

Hi Both

Can I please put a request in for a discussion point in the DPRs in the DDA and North as I won't be there?

Please can you ask the PLs/DPMs for a very brief update on

- How the induction process is going for any existing new starters?
- Where recruitment is ongoing or we have people due to start over the next few weeks what is the plan to ensure that the New Starters are given a consistent/structured induction and are not given a caseload until they have completed it?

Sorry to add to your agenda and this certainly doesn't need to take up huge amounts of time; my thinking is that maybe you could include this as a question to them during their presentations?

I'm mindful that we've had quite a few resignations in some areas where it may feel that we have no other option than to give caseloads as soon as individuals start.
I know I keep saying this but this totally defeats the object of the New Induction Process and supporting new colleagues in the business so I feel it is important that this is discussed at the meeting even if I'm not there.

Can you also please update me following the meetings?

Thank you so much

Sophie

--

Sophie O'Kelly

Performance Improvement Manager

Putting Ability First / Rhoi Gallu yn Gyntaf
Remploy Ltd

Mobile / Ffôn Symudol: 07789 171688

www.remploy.co.uk

EV21

Remploy Cymru
Putting ability first

Work and Health Programme Wales

WHP – Learning and Development Quarterly Management Meeting

[redacted] – [redacted] and Sophie O'Kelly

22.01.19

- **Progress update on Actions set in previous quarter**

First meeting – no actions to discuss from last quarter

- **Current staffing**
  - Overview of who is doing what role and where
  - Any changes from previous quarter
  - New Staff employed
  - Any recruitment ongoing / taking place over the next couple of months?
  - Staff leaving the business

[redacted] Team = 1 xPL, 1 x CC, 5 x WFKW, 1 x IWSA
[redacted] is due to start as an additional WFKW on 11/2/19.
No additional recruitment taking place currently.
No staff leaving the business.

- **Performance Issues/Learning & Training requirements**

Areas that [redacted] felt need addressing within the [redacted] team are:

- 'Challenging Customers' – [redacted], [redacted] and [redacted] all lack some confidence in being able to challenge customers in a positive way and need additional support.
- 'Sales Techniques' – Majority of the team are not confident in picking up the phone to an employer to 'spec out' a customer. [redacted] feels some support is required with Sales techniques to increase confidence.
- 'Facilitating to groups' – Team are under confident in how to deliver development sessions to participants. [redacted] feels that they need support in particular in how to structure sessions and encourage participation from the group.

Discussed with [redacted] that will take these ideas to the next Senior Management Meeting along with ideas from other branches to identify priority areas.
Also mentioned that MAPPA training will be delivered in February and Exit Report Process Training.

- **New Starter Induction Progress**
  - Random sample to be checked
  - Induction Feedback

[redacted] has not had any new staff for some time so as yet [redacted] has not had the opportunity to roll out the New Starter Induction Plans for her team. [redacted] is due to start in Feb 2019. [redacted] has the Induction Checklist, we have discussed the process and [redacted] is confident in using this with [redacted] We discussed the importance of following the process and ensuring weekly catch up meetings are booked in and followed out with the New Starter to ensure plan is updated and all necessary training booked in. Once all completed, [redacted] is to ensure this is signed off and uploaded to Cascade.

- **Staff Apprenticeships**

[redacted] will be delivering Apprenticeship opportunities to colleagues who have expressed an interest in the DDA.
For [redacted] would like to complete [redacted], [redacted]; [redacted] – Advice & Guidance Level 4.
Discussed with [redacted] that apprenticeships will have to be staggered to ensure minimal impact on the business. [redacted] will speak to all staff to explain that [redacted], [redacted] and [redacted] will be

first cohort to sign up. We will review in 3-6 months' time to look at start dates for other colleagues within the team.

- **PL Training if applicable**
  - Q2 - File Check Training

Completed File Check Training with [redacted] using the new File Checker. No issues – [redacted] is confident to complete this herself moving forward. She will most likely complete them during 1:1s with her team so she can feedback whilst employee is with her. Shared training materials with [redacted] Record we checked was of a good standard. Weekly contact was only slightly inconsistent and CV wasn't uploaded. [redacted] to ensure these are on Adapt moving forward.

- **Embedding of Learning**
  - Customer CVs - Random Sample and Feedback

Checked one CV whilst we completed a file check. Needed small tweaks to personal profile. Have asked [redacted] to ensure this is driven and embedded within the team following the training. [redacted] will check CVs moving forward as part of monthly 1:1s (those which have been created following the training) to check improvement and feedback.

- **Actions to be set/agreed**

Send to PL / DPM and [redacted] Actioned.

Action Plan

Date Agreed	Action	Timescale for Completion	Date of Completion
22.01.19	[redacted] to follow New Starter Induction Plan with [redacted] ensure weekly catch up meetings are booked in the diary and upload to Cascade when completed and signed off.	11/2/19	
22.01.19	Sophie to contact [redacted] Day 1 of employment to explain induction process/learning and development function	11/2/19	
22.01.19	Sophie to discuss Challenging Customers/Sales Techniques/Facilitating to Groups training (along with training mentioned from other branches) with Senior Management Team to establish where the priorities lie.	End of Feb 2019	
22.01.19	[redacted] to speak to [redacted] to explore possibility of Disability Webinars	End of Feb 2019	
22.01.19	Sophie to arrange for [redacted], [redacted] and [redacted] to meet Apprenticeship Assessors from [redacted]	End of Feb 2019	
22.01.19	[redacted] to speak to [redacted], [redacted] and [redacted] re. staggered Apprenticeship process and they will form Cohort 2 to undertake the qualification	End of Jan 2019	
22.01.19	[redacted] to complete all file checks for Valleys using new file checker. Sophie has sent [redacted] IDs	31.01.19	
22.01.19	[redacted] to arrange MAPPA training with [redacted]	End of Feb 2019	
22.01.19	Sophie to deliver 'Exits' Training to all Advisors	End of Feb 2019	
22.01.19	[redacted] to check one CV per EA per month and provide feedback at next meeting.	Ongoing	
22.01.19	[redacted] to ensure all CVs are uploaded to Adapt for sample checking.	End of Jan 2019	

Remploy
Putting ability first

EV22

Sophie O'Kelly <sophie.new@remploy.co.uk>

Senior Wales Team

12 December 2018

Sophie O'Kelly - 09:51
Morning All - Can I please just stress the importance of you and your teams using the New Starter Induction Plans for all roles. They need to be updated weekly and uploaded to Cascade when completed. I am currently working on a questionnaire that every new colleague will need to complete to evaluate their induction process at the end of month 3. I will be checking these are being completed during the Quarterly L&D Action Plan Reviews but please can you also reinforce the importance of these plans being followed. If you want to discuss give me a call.

[redacted] - 09:57
Thanks Sophie, please can you all support this request

Remploy
Putting ability first

EV23

Sophie O'Kelly <sophie.new@remploy.co.uk>

[redacted] New Starter Induction Feedback

1 message

Sophie O'Kelly <sophie.new@remploy.co.uk> 1 February 2019 at 09:20
To: [redacted] <[redacted]@remploy.co.uk>, [redacted] <[redacted]@remploy.co.uk>, [redacted] <[redacted]@remploy.co.uk>

Hi All

As discussed with [redacted] yesterday, here is the feedback from the end of month 1 Induction Catch Up Calls with [redacted] and [redacted] (this I will be doing for all new starters moving forward - but these 2 are the first)

Actions that I consider to be required following the calls:

- Weekly Induction Progress Meetings to be booked in the diary (These don't have to take long and can be done over the phone but this is an opportunity to ensure the induction checklist can be updated together. At the moment it seems it is being updated but more on an adhoc basis)
- Both [redacted] and [redacted] need time to complete their Elearning and Contract Training
- [redacted] has already made the decision to move [redacted] to [redacted] and has allowed her a weeks handover which I think is a positive move and what [redacted] needs to ensure she can spend some time observing/shadowing. I would also recommend doing a caseload review with [redacted] and whoever she will be taking over from during this period.

[redacted] and I agree that neither [redacted] nor [redacted] have had the opportunity to have the "ideal induction" and both were given a caseload early on due to resource issues in [redacted]. This has meant that their Induction Checklist is taking longer to complete and there are still some gaps in their knowledge. It seems that plans are in place to rectify this, especially with [redacted] having a weeks handover when she starts in [redacted]. [redacted] could also benefit from some time to complete her Contract Training and ELearning.

[redacted] and [redacted] - I have already put plans in place to ensure I can tighten up the induction process as much as possible in that I will now create the Induction Checklist for the New Starter and share with the Manager ahead of them starting. I have access to all start dates now so Day 1 calls with me are being booked in and end of month 1 calls. I will also be checking weekly catch ups have been booked in from day 1 with manager.

I know we had no choice in this scenario to give both [redacted] and [redacted] caseloads early on but for me moving forward and especially when we have the 6 additional heads, then we should only allocate a caseload once the induction has been completed and uploaded..... if this isn't happening then I feel there is no benefit to it as we are just doing what we have done before and providing an inconsistent induction which was introduced to provide consistency and reduce staff turnover. Let me know your thoughts?

Thanks

Sophie
--

Sophie O'Kelly

Performance Improvement Manager

Putting Ability First / Rhoi Gallu yn Gyntaf
Remploy Ltd

Mobile / Ffôn Symudol: 07789 171688

www.remploy.co.uk

E24

Questions Responses 32

New Starter Induction Feedback

Information gathering to assess the overall Induction Process. Feedback will be assessed and improvements implemented if required.

Email address *

Valid email address

This form is collecting email addresses. Change settings

How would you rate the induction overall? *

- Excellent
- Good
- Fair
- Poor

At what point in your induction did your Manager provide an overview of the Induction Programme? *

Remploy
Putting ability first

EV 25

Sophie O'Kelly <sophie.new@remploy.co.uk>

Important - Please Read: New Starter Inductions

Sophie O'Kelly <sophie.new@remploy.co.uk> 8 May 2019 at 13:02
To: [redacted]@remploy.co.uk>, [redacted]@remploy.co.uk>, [redacted]@remploy.co.uk>, [redacted]@remploy.co.uk>, [redacted]@remploy.co.uk>, [redacted]@remploy.co.uk>, [redacted]@remploy.co.uk>, [redacted]@remploy.co.uk>, [redacted]@remploy.co.uk>, [redacted]@remploy.co.uk>
Cc: [redacted]@remploy.co.uk>, [redacted]@remploy.co.uk>, [redacted]@remploy.co.uk>, [redacted]@remploy.co.uk>, [redacted]@remploy.co.uk>

Hi All
Hope you're well.
Please can I just remind you of the importance of dialling into New Starter Induction catch up calls on Day 1; At the end of Month 1; Month 2 etc ahead of the induction being signed off and encouraging your new starters to do the same.
The Induction of New Starters is critical to ensure the increased likelihood of these colleagues staying in the business and being successful in their roles.
I know you will agree that driving the correct behaviours within your teams is important and I need your input to ensure the induction process is followed. Recently I have had a number of catch ups with new starters where it has become apparent that the induction checklist is not being updated from one month to the next. It seems like we have all good intentions on day 1 and then things get in the way and the the induction takes a back seat. ***We can't allow this to happen*** and I don't want to highlight individual cases where this is happening but all I ask moving forward is that you ensure the staff induction process is facilitated correctly and regular catch ups are in place to ensure your new starters receive the correct training/support they require.
If anyone has any questions or is unclear on the process then just give me a call but please if you need to reschedule a catch up call with your new starter as either of you are unable to attend, then please let me know ahead of the call.
Thanks
Sophie

--

Sophie O'Kelly

Performance Improvement Manager

Putting Ability First / Rhoi Gallu yn Gyntaf
Remploy Ltd

Mobile / Ffôn Symudol: 07789 171688

www.remploy.co.uk

Remploy
Putting ability first

EV26

Sophie O'Kelly <sophie.new@remploy.co.uk>

Important - Please Read: New Starter Inductions

[redacted]@remploy.co.uk> 8 May 2019 at 18:23
To: Sophie O'Kelly <sophie.new@remploy.co.uk>
Cc: [redacted]@remploy.co.uk>

Hi Soph

CC'd you in [redacted] as per follow up email.

Please can invite me to the calls after month 1 as it will be good as a DPM to be aware of the progress being made or not!

Many thanks
[redacted]

[redacted]

Office: [redacted]
Mobile: [redacted]

E-mail/E-bost - [redacted]@remploy.co.uk

Putting Ability First / Rhoi Gallu yn Gyntaf
Remploy Ltd
www.remploy.co.uk

https://twitter.com/remploynwales

www.youtube.com/Remploytv

https://www.facebook.com/RemployWrexham

CONFIDENTIALITY NOTICE: This email, including attachments, is for the sole use of the intended recipients and may contain confidential and privileged information or otherwise be protected by law. Any unauthorised review, use, disclosure or distribution is prohibited. If you are not the intended recipient, please contact the sender, and destroy all copies and the original message.

Please consider the environment before printing this email.

CONFIDENTIALITY NOTICE: This email, including attachments, is for the sole use of the intended recipients and may contain confidential and privileged information or otherwise be protected by law. Any unauthorised review, use, disclosure or distribution is prohibited. If you are not the intended recipient, please contact the sender, and destroy all copies and the original message.

Please consider the environment before printing this email.

Remploy
Putting ability first

EV27

Sophie O'Kelly <sophie.new@remploy.co.uk>

Re: Start dates for Remploy

[redacted] <[redacted]@remploy.co.uk> 14 March 2019 at 17:12
To: [redacted] <[redacted]@maximusuk.co.uk>
Cc: [redacted] <[redacted]@healthmanltd.com>, Sophie Okelly <sophie.new@remploy.co.uk>, [redacted] <[redacted]@remploy.co.uk>

Hi [redacted]

Hope you are well? As requested, please find attached the new "tailored" version of the induction plan for an employment advisor.

New "Tailored" Induction Plan - EA

Sophie & I have made some changes based on the following requirements:

1. PC - Early Starters - the baseline induction plan has been used and line managers will ensure that the elements highlighted **"ES"** are completed by the new member of staff. This allows the new starter to complete the non-customer focused or system related elements. Once the clearance has been received, the new starter can move on to complete the other elements of the induction plan.
2. Fastrack (FT) - we have been reviewing the time it takes to get a new starter live working with a caseload. In some cases we have new starters who have previous welfare to work experience (as a indication 2 years could be the qualifier to allow Fastrack to be conducted) and are able to have a caseload before the 4 week point. We have now updated the induction plan and highlighted areas that need to be completed by this group before they can go live with a caseload, these elements are highlighted **"FT".** To the right of the induction plan you will see a detailed overview of the "Fastrack Induction" that will now include an assessment completed by Sophie before they are allowed to have a caseload. The caseload will be small to start with but increased as the continue to complete other elements of the induction.

Potentially we will have new starters who could fall in to both of the above categories. They will not be allowed to undertake the elements of the Fastrack until the clearance has been received. Let me know your thoughts on the above? Thanks

Regards,

[redacted]

Mobile: [redacted]

Website: www.remploy.co.uk

DC Leader.jpg

You can follow us on:

[Quoted text hidden]

EV28

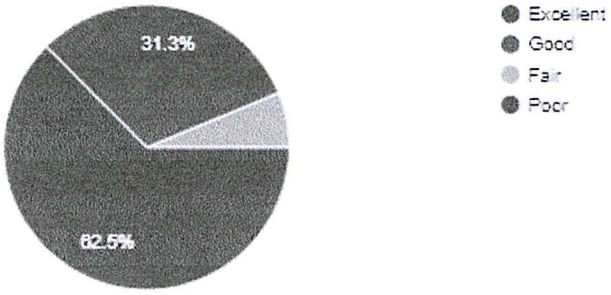
Managers Name
[redacted]

New Joiners Comments: It has been a well thought out and comprehensive induction programme that has been regularly reviewed and signed off. This has ensured I know where I am in the training/induction process and to understand my journey on the learning curve. I have felt throughout that I have been fully supported and there has been plenty of opportunity given to me to clarify any training previously given to ensure I have fully understood the procedures. Having just 2 main points of contact within the office (who work in a very similar way) with a dedicated System Query Hang-Out for me has been invaluable.

EV29

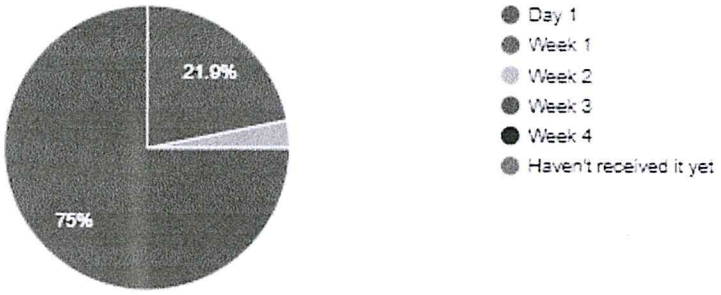
How would you rate the induction overall?

32 responses



At what point in your induction did your Manager provide an overview of the Induction Programme?

32 responses



What aspects of the induction did you find the most valuable?

32 responses

Structure

As I am experienced in the welfare to work work industry, I felt the specific systems training and companies policies were where I learnt the most and were valuable to my own learning experience.

Sophie's induction calls, E-Learning and the links.

Having the clear plan of what I was expected to cover, gave me control over my induction and learning / training. Sophie very kindly emailed through some additional information with regards to Maximus which gave me more of an insight around the company.

For me it was the overall structure of the induction and overview of the Contract, knowing what my roles and responsibilities were in relation to the organisation.

Learning & Development Update

Remploy Cymru
Rhoi gallu yn gyntaf
Putting ability first

Gwaith ac Iechyd Rhaglen Cymru
Work and Health Programme Wales

Quarter 2	Positives	Areas of Risk	Focus for Quarter 3
Training • **MAPPA** • **Job Coaching** • Think Differently • MHFA • CV Workshop (DDA) • File Checks • Exit Reports	• Variety of Training • Addressed issues highlighted at Q2 L&D Meetings • Course Content • Course Feedback • New ideas/Approaches	• Embedding of learning • Follow up Meetings with Manager • Confusion of process following MAPPA training	• Sessions booked for Training on Adapt Updates, Automated Exits, LTU refresher, Self Employed. • MAPPA training roll out • Job Coaching roll out • Continue to drive 'Learning Embedding' with Managers
Induction Process	• Embedding of Induction Process • Induction Plans created for 5 roles • Fast Track / Early Starters • Disability Training added • Cardiff Branch – can be used for training • Buddying/Mentoring	• Signing off Inductions • ADAPT ability not tested	• Continue with Induction Calls (Day 1, Month 1, Month 2 etc.) • Group System Training • Buddy/Mentor Approach to be explored further with all new starters where possible
Apprenticeships	• 7 Colleagues signed up on Apprenticeships • 2 further sign ups to be arranged for Cohort 1 • Positive feedback from Assessor	• Impact on the business • Impact on colleague	• Managing the process closely • Regular updates with Staff and Assessor

EV30

Remploy
Putting ability first

EV31

Sophie O'Kelly <sophie.new@remploy.co.uk>

[redacted] L&D Meeting

3 messages

Sophie O'Kelly <sophie.new@remploy.co.uk> 22 January 2019 at 14:02
To: [redacted] <[redacted]@remploy.co.uk>
Cc: [redacted] <[redacted]@remploy.co.uk>, [redacted] <[redacted]@remploy.co.uk>

Hi [redacted]

Thank you for your time this morning.

Please find attached meeting document with discussion points and actions to work on ahead of our next meeting.

Any questions just give me a shout

Thanks

Sophie

--

Sophie O'Kelly

Performance Improvement Manager

Putting Ability First / Rhoi Gallu yn Gyntaf
Remploy Ltd

Mobile / Ffôn Symudol: 07789 171688

www.remploy.co.uk

L&D Meeting [redacted] 22.01.19.docx
107K

[redacted] <[redacted]@remploy.co.uk> 22 January 2019 at 14:09
To: Sophie O'Kelly <sophie.new@remploy.co.uk>

Fab, cheers Soph

[Quoted text hidden]

> [Quoted text hidden]
> *CONFIDENTIALITY NOTICE: This email, including attachments, is for the sole use of the intended recipients and may contain confidential and privileged information or otherwise be protected by law. Any unauthorised review, use, disclosure or distribution is prohibited. If you are not the intended recipient, please contact the sender, and destroy all copies and the original message.*
>
> *Please consider the environment before printing this email.*

--

[redacted]

Remploy Ltd -
Putting Ability First - Rhoi Gallu yn Gyntaf
[redacted]

EV32

Student Name:	Sophie O'Kelly
Course:	CIPD HR
Witness Name:	Paul Lewis
Position:	Senior Performance Manager (Was Interim Head of Operations)
Relationship to Student:	Line Manager (at the time of the event)

Learning Outcome's –
Be able to implement a change plan
Be able to assess the impact of change processes within an organisation

I have read the submissions in respect of the above Learning Outcome's and I can confirm that Sophie's evidence, actions and information are authentic and accurate. Having worked closely and supported Sophie during the project referenced, Sophie was instrumental in the managing the project from start to finish. During the project, Sophie identified a risk around the induction of new starters and the successful completion of the induction programme. She introduced a control mechanism to monitor each individual's progress to ensure they remained on track and also 3 way calls were implemented to support the line manager and ensure they were accountable for supporting the new member of staff – this was embraced by all the stakeholders and ensured all parties were responsible for the process.

Sophie was not afraid to challenge managers who were not following the process, providing evidenced based feedback for consistency and highlighting inconsistencies. Sophie encouraged & welcomed feedback but remained focused on the project outcomes at all times. There were some challenges but to combat this Sophie arranged regular meetings / briefings with Senior Manager's so they were aware of the risks and support required to achieve the requirements.

Sophie constantly reviewed the process and made improvements where necessary. An issue was identified were new starters were given caseloads too soon. Sophie challenged this concept with managers and reinforced the need to follow the plan. Sophie also introduced a flexible approach to new starters with experience of the industry. A "fast Track" version of the induction plan was developed and after negotiations with HR, this was signed off and introduced. The business benefited from this new initiative as experienced new starters could quickly support with the increasing caseloads.

The overall success of the project allowed Sophie to share the best practice, learnings and the decrease of attrition rate with other areas & regions within the business. The basis of this induction plan as now been embedded across all contracts and Sophie should be very proud of the impact and influence she had not only with this project but on the rest of the business.

Signed:	Paul Lewis	**Date:**	17/1/2021

Personal Statement

3.1

Consultation with stakeholders to monitor and measure effectiveness was continuous during induction progress calls, at L&D meetings and at SLT meetings. This qualitative feedback allowed us to continually enhance the process such as introducing a 'Fast Track' element (EV27). This method enabled dialogue and discussion and allowed us to better understand 'why' things were happening (Perkins & Woodhams, 2016).

The vision of improving staff retention rates by developing, implementing, embedding and evaluating a robust induction programme was defined in the change plan (EV9). Survey feedback was captured to assess the effectiveness of the change, providing both quantitative and qualitative data (EV29). The data evidenced that 93.8% of colleagues rated their induction as either 'Excellent' or Good'; 93.8% of colleagues felt their induction helped them to understand their role and responsibilities and 96.9% of colleagues felt their induction helped them understand more about the organisation and its people.

Leaver data was tracked on the induction tracker so that attrition rates could be measured. From Oct 2018 to Nov 2019, attrition rates of new colleagues reduced from 41% to 16%. On Kubler-Ross' change curve, this would be the 'Commitment' stage where new ways of working have been adopted (Hodges, 2016).

Key Stakeholders were appreciative of the efforts that had gone into the change (EV33). Change needs the backing of HR who can also draw on change experiences and use it to support others (Vere and Butler, 2007, cited in Armstrong, 2016). Our HRBP requested to share the induction with the other Maximus businesses (EV34).

3.2

The data provides many positives; however there are still areas to improve (EV35). 25% of survey respondents didn't receive their induction on day 1 and 12.5% stated that regular catch ups with their Line Manager hadn't taken place. Recognising where improvements still can be made is referred to as 'Building on the Change' in Kotter's change process in order to achieve long term success (MindTools, 2007).

Following the success of this project, the Talent & Development Team were asked to create a National Induction Programme to ensure consistency across all regions and contracts. The T&D team used this induction programme and its learnings to create a national induction. A proposal was created for the Operations Director and Senior HRBP (EV36) before being rolled out to Line Managers nationally (EV37). This is the final stage of Kotter's change process where the change becomes part of the corporate culture with organisation leaders supporting the change (MindTools, 2007).

During the COVID-19 pandemic, the induction needed to be rapidly adapted to cater for large group inductions, delivered remotely. A colleague and I adapted the induction to meet these requirements (EV38).

3.3

We anticipated that there would be some resistance so ensured the change was implemented through negotiation and social interaction with colleagues (CIPD, 2020). This change required a culture shift for Line Managers who had always had autonomy with colleague induction. Its important Leaders have an agile mind-set for change; however they can't achieve it alone. It was important that they were equipped, developed and supported (Clifton & Harter, 2019).

A year following implementation of the change, an outcome email was sent to all key stakeholders (including HR, the Operations Director and the CEO) (EV39). The email summarises the journey and highlights the outcomes that have been achieved, including seeing a significant improvement in staff retention and stability to our recruitment, which was another longer term benefit of this change. We were celebrating these achievements which Lewin's change model refers to as the 'Refreezing' stage, where change has been embraced and has become Business as Usual (Mindtools, 2006). We prepared a presentation for our External Stakeholders that clearly demonstrates the outcomes achieved (EV1).

3.4

On reflection; throughout the building of this portfolio and from my learnings taken from this module, I have already identified a number of areas in which I would either build on or build into a future change process. In addition to this I have used the new CIPD Profession Map to assess the effectiveness of my performance at Associate level (EV40).

I am confident in completing a SWOT analysis to identify areas where change is needed. PESTLE is a tool I have less experience with but understand how this helps to identify the drivers for change in the external environment (Hughes, 2010). Neither SWOT nor PESTLE was used ahead of this change, but I will adopt this approach moving forward to better inform the business case. I certainly see the benefit of creating a change plan in the format evidenced in this portfolio (EV9) and will ensure this is completed for future change initiatives.

In terms of change management processes and models, I am familiar with the work of Lewin, Kotter, Kubler-Ross and McKinsey, all of which had been documented throughout this portfolio. I will ensure to refer to the work of Kotter in particular when planning change in the future as Kotter's 8-step change process has been developed following four decades of observation of leaders trying to transform or execute their strategies (Kotter, 2017).

Communication and support was provided in various different formats; however a skills audit may have been helpful during the planning stage to inform the plan for support and training.

I am familiar with how different levers can be used to enable change. During this project, strong Leaders were on hand to support and champion the need for change. Where I think I could improve further would be to elect change champions at all levels. Change champions are individuals on the ground that can help to gain commitment, encourage new behaviours and help to embed the change (Pickering, 2009).

I plan to develop my technical skills around project management further. I found myself wearing many different hats during this change including Change Lead and Project Lead. Austin (2015) describes how it's more beneficial to keep these roles separate which I will consider for my next change project.

A Witness Testimony is provided in support of Learning Outcome Three (EV32).

.

Bibliography:

ARMSTRONG, M. (2016) *Armstrong's Handbook of Strategic Human Resource Management.* 6th edn. London: Kogan Page.

AUSTIN, J. (2015) 'Leading Effective Change: A Primer for the HR Professional, *SHRM Foundation's Effective Practice Guidelines Series,* Aug 2015, pp.01 – 36. Available at: https://www.shrm.org/hr-today/trends-and-forecasting/special-reports-and-expert-views/Documents/Leading-Effective-Change.pdf (Accessed: 17 Jan. 21).

CIPD (2020) *Change Management* [Online]. Available at: https://www.cipd.co.uk/knowledge/strategy/change/management-factsheet (Accessed: 17 Jan. 21).

CLIFTON, J. & HARTER, J. (2019) *It's the Manager.* New York: Gallup Press.

HODGES, J. (2016) *Managing and Leading People through Organisational Change.* London: Kogan Page.

HUGHES, M. (2010) *Managing Change: A Critical Perspective.* 2nd edn, London: CIPD.

KOTTER (2017) *The8-Step Process for Leading Change* [Online]. Available at: https://www.kotterinc.com/8-steps-process-for-leading-change/ (Accessed: 17 Jan. 21)

MINDTOOLS (2007) *Kotter's 8-Step Change Model* [Online]. Available at: https://www.mindtools.com/pages/article/newPPM_82.htm (Accessed: 16 Jan. 21)

MINDTOOLS (2006) *Lewin's Change Management Model* [Online]. Available at: https://www.mindtools.com/pages/article/newPPM_94.htm (Accessed: 15 Jan 2021).

PERKINS, G. & WOODHAMS, C. (2016) 'Using information in Human Resources', in Taylor, S. & Woodhams, C. 2nd edn. *Studying Human Resource Management.* London: CIPD.

PICKERING, B. (2009) 'Make change sustainable with 'Change Champions', *HR Zone* [Blog]. 13 Aug. Available at: https://www.hrzone.com/lead/change/make-change-sustainable-with-change-champions (Accessed: 17 Jan. 21).

Remploy
Putting ability first

EV33

Sophie O'Kelly <sophie.new@remploy.co.uk>

WHP Wales - New Starter Induction Process Update

[redacted]@remploy.co.uk> 8 November 2019 at 19:20
To: Sophie O'Kelly <sophie.new@remploy.co.uk>

Well done Soph...you've put loads of work into the new starter process and it's clearly made a massive difference.

It really helped with [redacted]

So a massive thanks for me.

[redacted]

[Quoted text hidden]

> [Quoted text hidden]
> *CONFIDENTIALITY NOTICE: This email, including attachments, is for the sole use of the intended recipients and may contain confidential and privileged information or otherwise be protected by law. Any unauthorised review, use, disclosure or distribution is prohibited. If you are not the intended recipient, please contact the sender, and destroy all copies and the original message.*
>
> *Please consider the environment before printing this email.*

CONFIDENTIALITY NOTICE: This email, including attachments, is for the sole use of the intended recipients and may contain confidential and privileged information or otherwise be protected by law. Any unauthorised review, use, disclosure or distribution is prohibited. If you are not the intended recipient, please contact the sender, and destroy all copies and the original message.

Please consider the environment before printing this email.

Remploy
Putting ability first

EV34

Sophie O'Kelly <sophie.new@remploy.co.uk>

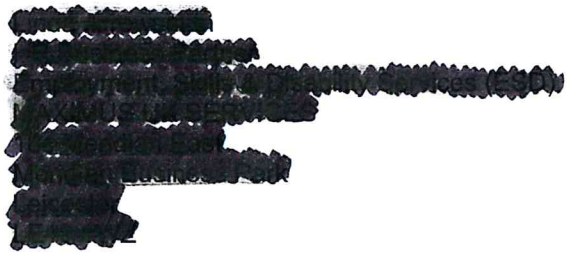
Induction

[redacted]<[redacted]@maximusuk.co.uk> 3 September 2020 at 14:54
To: sophie new <sophie.new@remploy.co.uk>

Hi - the HRBPs across the businesses have been talking about inductions; and I spoke about the work that you'd done for us, I'm thinking that it would be good to share what you have done, if this is OK with you, so other areas of the business can see how successful this have been....

Would this sit OK with you?

Thanks,



M: [redacted]
E mail:[redacted]@maximusuk.co.uk<mailto[redacted]@maximusuk.co.uk>

CONFIDENTIALITY NOTICE: This email, including attachments, is for the sole use of the intended recipients and may contain confidential and privileged information or otherwise be protected by law. Any unauthorised review, use, disclosure or distribution is prohibited. If you are not the intended recipient, please contact the sender, and destroy all copies and the original message.

Maximus UK Services Limited (registered number: 9072343; VAT number: 200221005) is registered in England and Wales (with trading names including but not limited to Centre for Health and Disability Assessments, Maximus People Services, Remploy, Health Management and Revitalised). The registered office for Maximus UK Services Limited is Ash House, The Broyle, Ringmer, East Sussex, BN8 5NN, United Kingdom.

Maximus People Services Ltd (registered number: 03752300; VAT number: 207281428) and Remploy Limited (registered number: 09457025; VAT number: 585594190) are registered in England and Wales. The registered office for each is: Remploy House, 18c Meridian East, Meridian Business Park, Leicester, Leicestershire, LE19 1WZ, United Kingdom. Health Management Limited (registered number: 4369949; VAT number: 792250621) and Revitalised Limited (registered number: 4916876; VAT number: 831804737) are registered in England and Wales. The registered office for each is: Ash House, The Broyle, Ringmer, East Sussex, BN8 5NN, United Kingdom.

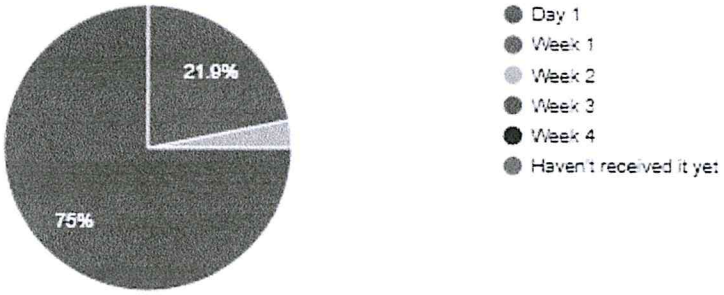
This message has been scanned for malware by Websense. www.websense.com

winmail.dat
9K

EV35

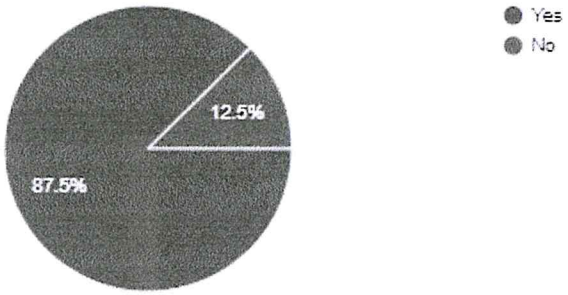
At what point in your induction did your Manager provide an overview of the Induction Programme?

32 responses



Have you had regular meetings with your Line Manager to discuss your Induction progress?

32 responses



WHP Induction Proposal

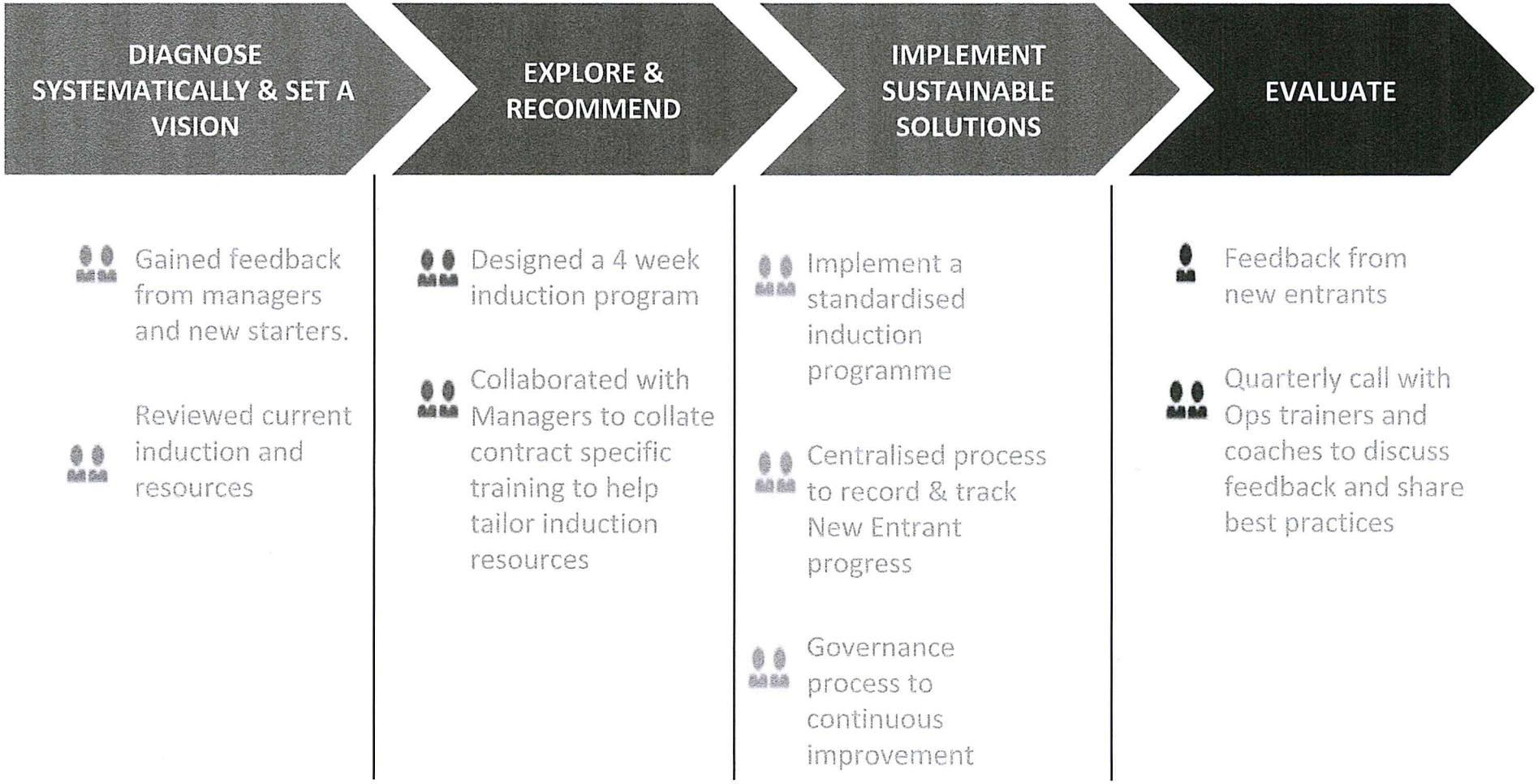
By [redacted] & Sophie O'Kelly



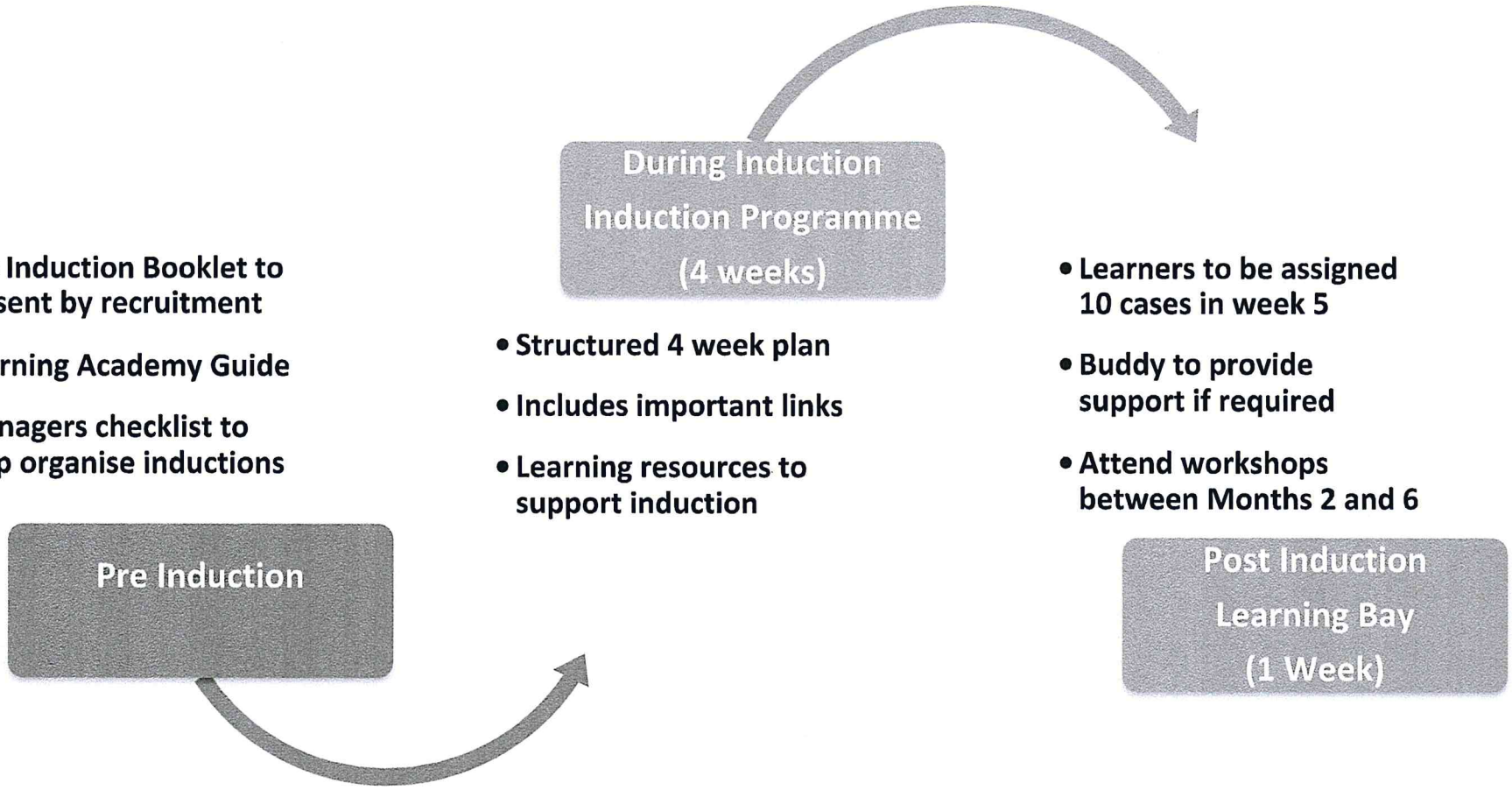
MAXIMUS | United Kingdom

EV36

Approach


DIAGNOSE SYSTEMATICALLY & SET A VISION
Gained feedback from managers and new starters.
Reviewed current induction and resources
EXPLORE & RECOMMEND
Designed a 4 week induction program
Collaborated with Managers to collate contract specific training to help tailor induction resources
IMPLEMENT SUSTAINABLE SOLUTIONS
Implement a standardised induction programme
Centralised process to record & track New Entrant progress
Governance process to continuous improvement
EVALUATE
Feedback from new entrants
Quarterly call with Ops trainers and coaches to discuss feedback and share best practices

New Entrant Journey



Sustainable Solution

Collaborate

Line Manager

- Follow the the managers checklist to ensure all the systems requirements and equipment is ordered
- Organise inductions by sending invites to the appointed buddy and for regular check-ins
- Assign a desktop

Buddy

- Buddy to follow the induction plan and provide feedback to the line manager on the progress of the new starter
- Make suggestions for additional training if required during Learning Bay

Ops Trainer and Coach

- Follow up with Line Manager if all the pre-induction requirements are fulfilled
- Track new starter performance
- Follow the induction governance process and collate feedback
- Quarterly calls to discuss induction feedback with Ops trainer and coach from other regions to ensure induction remains consistent

Post Induction Plan

Month	Activity	Scheduling
Month 1	SLT Call	
Month 2	CV Writing and Interview Skills Workshop	Beginning of the Month Wales x 1 Session per month Scotland x 1 Session per month South x 1 Session per month London x 1 Session per month
	Motivation & Confidence Building Workshop	End of the Month Wales x 1 Session per month Scotland x 1 Session per month South x 1 Session per month London x 1 Session per month
Month 3	Objection handling/ Difficult conversations (appearance/cleanliness) workshop	End of the Month Wales x 1 Session per month Scotland x 1 Session per month South x 1 Session per month London x 1 Session per month
Month 4	Mental Health Awareness Workshop	End of the Month Wales x 1 Session per month Scotland x 1 Session per month South x 1 Session per month London x 1 Session per month

Remploy
Putting ability first

EV37

Sophie O'Kelly <sophie.new@remploy.co.uk>

Induction Overview

1 message

[redacted] <[redacted]@maximusuk.co.uk> 23 September 2019 at 15:32
To: [redacted] <[redacted]@maximusuk.co.uk>, [redacted] <[redacted]@maximusuk.co.uk>, [redacted] <[redacted]@maximusuk.co.uk>, [redacted]@chdauk.co.uk>, sophie new <sophie.new@remploy.co.uk>
Cc: [redacted] <[redacted]@maximusuk.co.uk>

Good afternoon,

Hope you are well.

As the Talent & Development Partner for Remploy, [redacted] and [redacted] asked me to review the current induction process to help improve attrition. Over the last few months I have been collaborating with Sophie O'Kelly to redesign the Induction programme for Change Coaches/Key Workers/Employment Advisors.

The new Induction will be launched on 11th October, so ahead of the launch I would like to share the induction plan with yourselves and talk through the new approach and resources.

Please let me know if you have any questions.

Many thanks

Veena

.

CONFIDENTIALITY NOTICE: This email, including attachments, is for the sole use of the intended recipients and may contain confidential and privileged information or otherwise be protected by law. Any unauthorised review, use, disclosure or distribution is prohibited. If you are not the intended recipient, please contact the sender, and destroy all copies and the original message.MAXIMUS People Services Limited (registered number: 03752300) and Remploy Limited (registered number: 09457025) are registered in England and Wales. The registered office for each is: Remploy House, 18c Meridian East, Meridian Business Park, Leicester, Leicestershire, LE19 1WZ, United Kingdom. The Centre for Health and Disability Assessments Ltd (registered number: 9072343), Health Management Ltd (registered number: 4369949) and Revitalised Limited (registered number: 4916876) are registered in England and Wales. The registered office for each is: Ash House, The Broyle, Ringmer, East Sussex, BN8 5NN, United Kingdom.

Please consider the environment before printing this email.

This message has been scanned for malware by Websense. www.websense.com

invite.ics
4K

Remploy
Putting ability first

EV38

Sophie O'Kelly <sophie.new@remploy.co.uk>

Revised Induction Programme - EA

Sophie O'Kelly <sophie.new@remploy.co.uk> 7 May 2020 at 13:21
To: [redacted]@maximusuk.co.uk>
Cc: [redacted]@remploy.co.uk>

Hi [redacted]
Hope you're well.
Following our call on Tuesday, [redacted] and I have been working on adapting the current EA/Key Worker Induction Programme. Our challenge been ensuring the induction can still provide these new starters with all the support/coaching/training they need ahead of working an active caseload (that can also be delivered remotely) whilst also attempting to compress it if possible so it can be delivered in a shorter time frame.
The attached is what we have pulled together so far for discussion.
Just to add as a background to the attached spreadsheet; we chose not to reinvent the wheel and used the current induction programme as a starting point. We have simply added the 'core' workshops into the plan and pulled some sessions forward to reduce it to 3 weeks rather than 4. We have agreed that it is possible for the New Starter to be given a gradual caseload from the end of week 2 to start working with on week 3 but Line Manager and buddy support would still be absolutely critical at this stage. Week 3 would involve live appointments with Line Manager observation and Sign off.
We made no changes to day 1. All core workshops will be delivered in week 1 but they will need to be tweaked for remote delivery. The Job Skills workshop doesn't currently exist but we agreed that this is probably best delivered through observation and coaching rather than as a workshop. As a recommendation however we felt that a 'handy hints/tips' document could be created as a guide to relevant job sites etc to support this training.
Buddy support throughout will be vital where the induction is delivered remotely. Participant Observations would need to be delivered via Google Hangout (or another system) through EA's sharing screens. If Elearning could be completed prior to start date then this would also be beneficial.
We are all unsure at this stage as to the contract specifics so it may be that some sessions can be removed such as 'Contract Training', Reports etc. but we have left them in at this stage until we are clear. Likewise, we also made the assumption that Monthly Appraisals may still be required in some shape or form so we have left those in there for now too.
Systems training will start at the end of week 1, with continued systems practise in week 2 with support from a buddy.
This is what we have got for now so thought we'd share, and as mentioned it may be good time to get a call in at this point to discuss in more detail when you have a minute?
Hope this is ok - Have a great weekend
Sophie

--

Sophie O'Kelly

Performance Improvement Manager

Putting Ability First / Rhoi Gallu yn Gyntaf
Remploy Ltd

Mobile / Ffôn Symudol: 07789 171688

www.remploy.co.uk

Revised Induction Programme (Employment Advisor) v0.1.xlsx
322K

Remploy
Putting ability first

EV39

Sophie O'Kelly <sophie.new@remploy.co.uk>

WHP Wales - New Starter Induction Process Update

Sophie O'Kelly <sophie.new@remploy.co.uk> 8 November 2019 at 16:52
To: [redacted]@remploy.co.uk>, [redacted]@remploy.co.uk>, [redacted]
<[redacted]@remploy.co.uk>, [redacted]@remploy.co.uk>, [redacted]
[redacted]@remploy.co.uk>, [redacted]@remploy.co.uk>, [redacted]
<[redacted]@remploy.co.uk>, [redacted]@remploy.co.uk>, [redacted]
<[redacted]@remploy.co.uk>, [redacted]@remploy.co.uk>, [redacted]
<[redacted]@remploy.co.uk>, [redacted]@remploy.co.uk>, [redacted]
[redacted]@remploy.co.uk>, [redacted]@remploy.co.uk>, [redacted]
<[redacted]@remploy.co.uk>, [redacted]@remploy.co.uk>
Cc: [redacted]@remploy.co.uk>, [redacted]@remploy.co.uk>, [redacted]
<[redacted]@maximusuk.co.uk>, [redacted]@remploy.co.uk>, [redacted]@maximusuk.co.uk>,
[redacted]@maximusuk.co.uk>

Hi All

Just a quick note to say thank you for all your hard work in supporting and driving the New Starter Induction Process that we implemented in Wales at the beginning of last financial year in order to improve our New Starter staff retention rate.

I'm sure you will all admit that it has been a huge learning curve for us as a region. We have been on quite a journey with it which hasn't gone without its challenges. It's certainly been a working progress and we have learnt a lot as we have been going along about what works and what doesn't work to ensure we continuously improve it and have gained some really valuable staff feedback along the way.

I know operationally there are so many daily priorities so I wanted to thank you for investing your time to the induction process to ensure we see the long term impact.

I have pulled together some very basic stats from the information that I have, and have gone back to the start of WHP Wales (Dec 2017) to evidence the improvement that we have made as a region by following the new induction process:

Dec 2017 - Sept 18 - 34 New Starters recruited - 14 of which left the business (41%)
End of September 2018 - New Starter Induction Launched
Oct 2018 - Nov 2019 - 54 New Starters recruited - 9 of which have left the business (16%) - with 95% of those who have provided feedback rating their Induction Good to Excellent

I know this data doesn't delve into specific reasons why individuals left the business and I recognise there are still improvements to be made but I would certainly say the induction process you have all committed to over the year has got us to a stage where our recruitment is now fairly stable and we are seeing an improvement in our New Starter staff retention rate so thanks again and well done!

As always we need to continue to drive this with the New Induction Programme that has been launched nationally to continue to give our New Starters a great induction to our business and WHP Wales.

Thanks again everyone - have a great weekend!

Kind Regards,

Sophie
--

Sophie O'Kelly

Performance Improvement Manager

Putting Ability First / Rhoi Gallu yn Gyntaf
Remploy Ltd

EV40

Change standards

Each standard progresses through four levels of impact. Which level do you most embody in your day-to-day work?

Foundation level	Associate level	Chartered Member level	Chartered Fellow level
At this level you'll understand:	**At this level you'll understand:**	**At this level you'll understand:**	**At this level you'll understand:**
What a business case is and its purpose	How to do a SWOT and PESTLE analysis, and use data to create a case for change	How to use a broad range of evidence (eg external insight, benchmarking) to develop a costed business case	How to evidence the value of change for a range of stakeholder groups
The importance of planning and managing change	Different change management approaches and their advantages and disadvantages	How change management methodologies can impact culture in different ways	How change management methodologies and governance can create value for people and drive organisation performance
That people are an important part of any change, and that change can impact people in different ways	How to explain why change is happening, and basic models for how people experience change	How to apply principles of the psychology of change, and how to maximise the way people are listened to during change	How to paint a compelling vision of the future, and use psychology models to recognise the long term impact of change
How your organisation assesses people's skills and capability	How to conduct skills or capability audits and gap analyses in your area of work	How to assess current and future organisation capability and readiness for change across a range of stakeholder groups	Capability issues that exist within your sector, and how to assess current and future organisation capability and readiness for change
N/A	The different levers you can use to enable change in your current work	How to assess which levers will achieve and sustain change	How to assess which levers will achieve and sustain change across an organisation, and create long term value
What a good project plan looks like in your organisation, and why project goals, milestones, resources, risks, costs and interdependencies are important	How to plan and deliver a project, including goals, milestones, resources, risks, costs and interdependencies	How to select the right project methodology and resources, plan and deliver a project, and manage risks	How different project methodologies impact organisation culture and performance, and how to resource and manage risks for broad, complex programmes of work