

## **Change Management Case Study Scenario**

*The objective of the case study is to utilize the change management scenario for the learning activities in preparation for the learning community monthly call.*

The Information Technology Director of the state health department you work for recently paved the way for the agency to undergo a transformation in the way the data analysis, visualization, and reporting is accomplished. For years the health department utilized many disparate reporting solutions based on SPSS and Microsoft Excel. The health department recently set up an enterprise data warehouse and made Tableau available to all of the programs including the Epidemiology program. Your program director has asked you to manage the change aspect of the Tableau implementation within the program. She would like all of the Epi staff to utilize Tableau for reporting as soon as possible. Her goal is to standardize the way the program generates reports and visualizes data to improve decision making.

There have been previous attempts to roll out software solutions across the health department that have not gone well. Although from an information technology perspective many of these projects were a success, the health department staff were unable to realize the benefits of the new technologies. As a result, much of the staff is hesitant to “let go” of their current tools, like Excel, in favor of newer and more updated technology. In one particular instance, the failure of the project was due to the users not understanding how to leverage the technology in their day-to-day work efficiently. The staff continued utilizing previous software tools because they were not provided adequate training on how to utilize the new technology which led to frustration and a lack of adoption.

The Health Director, IT Director and the Epi Program Director are all very excited about the Tableau project and want to make sure the implementation across the programs is successful. The leadership team of the agency is encouraging the programs to utilize Tableau to build reports and visualizations that will be used to build a funding request going to the State Legislature 6 months from now. As your program’s Change Manager, you will be a critical part of the implementation team whose membership stretches across the agency. Based on previous experience, you realize that this implementation will be challenging because of the timeframe, previous system implementation failures, and the resistance that is already building within the programs.