

*The Right Projects for the Right Costs
to Achieve Strategic Objectives*

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The world leader in serving science



>125,000
colleagues



7,000
R&D scientists/engineers



\$1.5B
invested in R&D



>\$40B
in revenue

Learning objectives

1

Outline an effective and efficient prioritization process for strategic priorities, key initiatives, and new ideas

2

Apply ADKAR (awareness/desire/knowledge/ability/reinforcement) techniques to develop change management plans and influence the people side of change



Key takeaways



Develop a strategic project portfolio by aligning timing, costs and resources with organizational objectives



Application of Prosci™ ADKAR™ model for effective people-centric change management strategy

The Idea Submission and Prioritization process

What

- Working on the right projects, at the right time, for the right cost (resources) to achieve organizational goals and targets

How

- The Idea Prioritization process provides a consistent approach to identify, assess, and prioritize new ideas, problems and opportunities across the organization

In practice this means...

- All potential projects across the organization will be assessed and prioritized using the same criteria, ensuring that there is a clear, measurable value proposition aligned with every project that enters the pipeline

Idea Submission and Prioritization process

Overview: A consistent approach to identify, assess and prioritize new ideas, problems, and opportunities. It enables the organization to identify the Right Projects at the Right Costs to Achieve Strategic Objectives.

Idea Submission	Problem Opportunity Review	Functional Review	Capacity Planning	Prioritization Steering Committee
<ul style="list-style-type: none">Idea is submitted through Intake Portal by the Submitter/Requestor	<ul style="list-style-type: none">If approved, the idea is routed to create a business case by the Functional Process Manager with Business, IT, Finance Partners and PPI Coach	<ul style="list-style-type: none">Functional Leaders will review the business case, determine cost impact and prioritize against their roadmap	<ul style="list-style-type: none">Portfolio of approved ideas staffed at earliest availability accordingly by the impacted resource group(s)	<ul style="list-style-type: none">Management reviews to resolve conflicts as needed and align on overall portfolio of projects

Key personas: Identify who's who?

Submitter/Requestor

- Identifies an idea, problem or opportunity
- Ensures information on submission form is accurate

Functional Process Manager

- Understands the submission
- Understands the roadmap
- Challenges status quo

Functional Leader

- Conducts regular functional review meetings
- Approves business case and benefits
- Owns functional roadmap with ranking of projects

PPI Coach

- Coaches process managers to complete vetting of the problem statement
- Supports process managers to become self-sufficient with process

Finance Partner

- Review submissions for financial benefits
- Ensures business case assumptions are reasonable and achievable

IT Business Partner

- Reviews submissions for IT scope
- Determines whether change is IT work, enhancement or project

Phase 1: Idea Submission

Who?

Any colleague

What?

**Idea Submission form,
which can be accessed
from internal portal**

When?

Anytime

Phase 2: Problem Opportunity

Who?

**Functional Process
Manager, Finance
Partners, IT Partners,
PPI Coaches**

What?

**Review and add
additional information
to an idea, assign
business score**

When?

**After receiving
notification that an idea
has been submitted**

Phase 3: Functional Review

Who?

**Functional Leaders,
Process Managers, IT
Business Partners,
Finance, PPI**

What?

**Careful review of the
business and IT scores
along with functional
ranking of all ideas**

Disposition determined

When?

**Takes place 1 to 2 times a
month to review ideas
that have been screened
and approved by process
managers**

Phase 4: Capacity Planning

Who?

Resource Managers

What?

**Review project demands,
assign resources based
on availability**

When?

**After receiving
notification that a
submission has reached
Capacity Planning Status**

Phase 5: Prioritization Steering Committee

Who?

Prioritization Steering Committee

What?

- Gain alignment on top portfolio initiatives**
- Provide clarity on current priorities**
- Determine trade-offs**

When?

Quarterly

Prosci ADKAR Model: The Five Building Blocks for Successful Change





1

Project—What is changing?

Implement an end-to-end Idea Submission and Prioritization process solution for the organization

2

Purpose—Why are we changing?

Deliver an effective and efficient prioritization process for strategic priorities, key initiatives and new ideas

3

Particulars—How are we changing?

Create a single source of truth for new work and improve visibility

4

People—Who will be changing?

All colleagues



WIIFM: “What’s In It For Me”

What do you want?

Standardization

Single Source
of Truth

Delivery Efficiency

Visibility

Realistic Roadmap

Portfolio Ranking

Transparency

X-functional

Clear Expectations

Change Management Planning

Prepare Approach

Planning Consideration

1. Focus on quick wins and mission critical objectives
2. Commit to ownership by key adopters
3. Set clear success outcomes
4. Commit to invest time: 5% to 20%

Manage Change

Key Activities

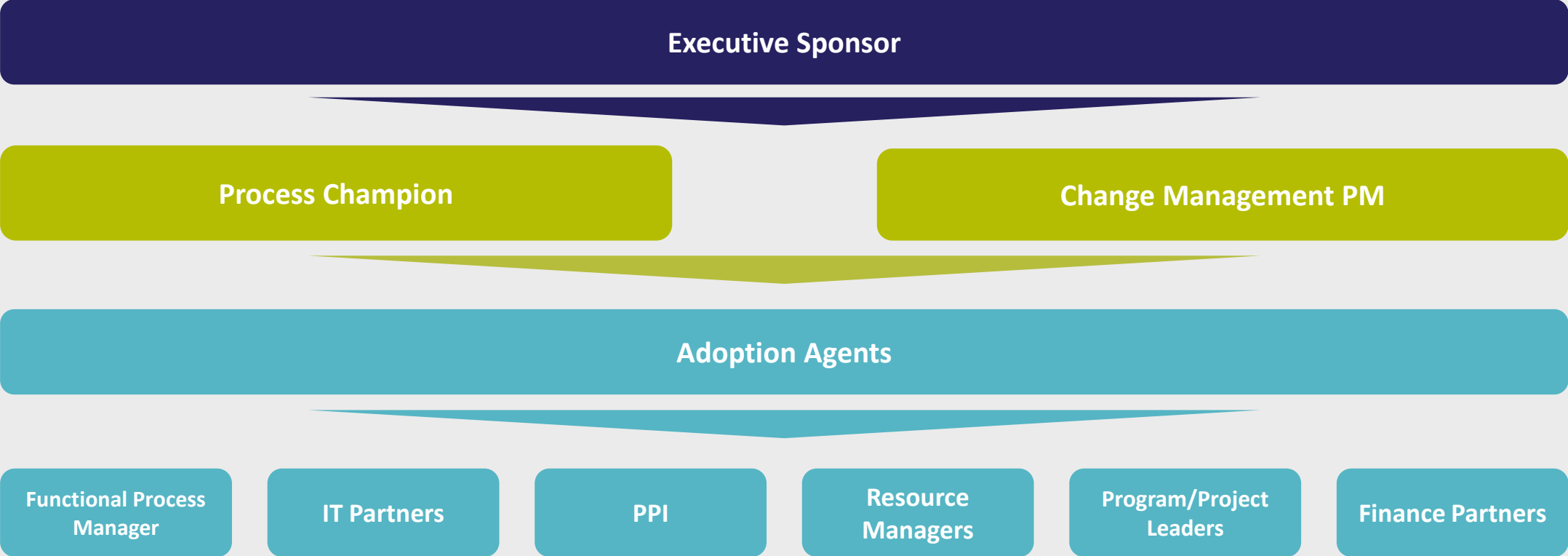
1. Establish key adopters
2. Formal training/guidebooks
3. Train peer group
4. Communications
5. Full launch

Sustain Outcomes

Key Activities

1. Celebrate/recognition
2. Update training materials
3. Transition to operations
4. Establish follow-up
5. ADKAR survey

Change Management Operating Structure



End-to-end visibility from strategy to delivery

**Drive
Prioritization**

**Focus on
strategic initiatives**

**Escalate cross-
functional ideas**

**Commit for
successful
execution**



Thank You!