



Disclosures

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- Board Member/Advisory Panel
- The Ohio State University Alumni Association, Treasurer
- The Association of Healthcare Foodservice (AHF), Industry Advisory Board

Learning Outcomes

Food Management Transition: Making Your Plan

At the end of this session, the participant will be able to...

- Explain the difference between change management and project management and why a transition plan is needed to transform your organization.
- Construct a transition plan incorporating the four stages of the transition learning model (TLM), i.e. conceptualization, stabilization, standardization, transformation.
- Measure the impact of transition on customer & colleague engagement, customer experience, safety, and financial outcomes.

Food Management Transition: Making Your Plan

APPETITE FOR CHANGE

What type of change are you experiencing in your organization?

- A. Menu/Service
- B. Technology
- C. Leadership
- D. New Facility

APPETITE FOR CHANGE

Food Management Transition: Making Your Plan

Examples of Changes in Hospitality

- Organizational Change**
 - Physical (new facility/kitchen)
 - Ownership (self-operations to contract or contract to self-operations)
- Operational Change**
 - Menu (heart healthy)
 - Technology(meal delivery, point of sales or loss prevention)
 - Service (room service, self-service)
- Developmental Change**
 - Recruitment and onboarding process
 - Downsizing or growth

Food Management Transition: Making Your Plan

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Food Management Transition: Making your Plan

Project Management → Technical side of the project

Change Management → People side of the project

Current State → Transition State → Future State

Leadership Skills

As a leader, effective strategy formulation skills are essential and necessary amid change.

The ability to translate business strategies from plan to action can set true leaders apart from their peers.

*Prosci, Inc.

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Food Management Transition: Making Your Plan

Project Management → Technical side of the project

Change Management → People side of the project

Current State → Transition State → Future State

Project Management is about installation ... it focuses on a plan built around events and timelines with the aim of getting from a current state to a future state.

Change Management is about adoption ... it focuses on the people aspects of the change with the aim of getting a critical mass of people to be committed to the change involved, to learn new behaviors and to sustain them willingly.

*Prosci, Inc.

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The Plan: Change Models Used in Business

Leavitt's Diamond- Established by Professor Harold J. Leavitt in 1965 focuses on organizational behavior, the dynamics of organizational change and the interaction of four interdependent components found in any business:

The people, the task, the structure and the technology.

Leavitt's theory says an overall strategy is vital because when change happens in any one of the four areas it affects the entire system.

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The Plan: Change Models Used in Business

"Kotters Eight Steps of Change"

1. Increase Urgency
2. Build the Guiding Team
3. Get the Right Vision
4. Communicate for Buy-In
5. Empower Action
6. Create Short-term Wins
7. Don't Let Up
8. Make it Stick

Creating a climate for change (Steps 1-3)
Engaging and enabling the whole organization (Steps 4-6)
Implementing and sustaining change (Steps 7-8)

*Kotter, John P. and Cohen, David S. THE SENSE OF URGENCY. Boston: Harvard Business School Press

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Why does most transition plans fail?

- > Contextually it is not viewed as a project and a change.
- > There is no standard change approach.*
- > Changes are not made based on data, or on the right data.*
- > The future state is not well defined.
- > The plan lacks a multi-faceted approach.*
- > There is confusion regarding the roles of management versus leadership*.

* Summary from Prosci Solutions

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The Plan: CDN Transition Learning Model (TLM)

Developed in 2016 by Sharon Cox, RDN as a guide and communication tool to navigate change in the Food and Nutrition industries.

This model addresses the common pitfalls of a failed plan:

- Integrates project management and change management strategies
- Outlines a standard approach to transition planning: conceptualization, stabilization, standardization, transformation
- Embraces a multi-faceted approach- e.g. integration of talent, processes, and systems
- Defines the roles and responsibilities of leaders vs. managers

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The Plan: CDN Transition Learning Model (TLM)

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The Plan: CDN Transition Learning Model(TLM)

Celebrate the milestones during the journey!

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CDN Transition Learning Model: Planning Template

	STAGE 1 conceptualization (3-6 months)	GO LIVE Phase	STAGE 2 stabilization (3 months)	STAGE 3 standardization (3-6 months)	STAGE 4 transformation (6 months-1 year)
Talent	Icon: 3 people	Icon: Up arrow	Icon: 3 people	Icon: 3 people	Icon: 3 people
Process	Icon: Document	Icon: Down arrow	Icon: Document	Icon: Document	Icon: Document
Systems	Icon: Gears	Icon: Gears	Icon: Gears	Icon: Gears	Icon: Gears

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CDN Transition Learning Model (TLM)

Each stage includes three main dimensions:

- Talent (resources to do the work)
- Process (procedures to conduct the work)
- Systems (tools to work efficiently)

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TLM Transition Plan: Talent

- The **Talent** dimension focuses on the people aspects of the change with the aim of gaining commitment to the change involved, to learn new behaviors and to sustain them willingly.
- Key indicators under the **Talent** dimension include:
 - Role of Leadership (**Gain Commitment**)
 - Education and Training (**Learn New Behaviors**)
 - Employee Engagement and Retention (**Sustain Changes**)

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TLM Transition Plan: Talent

CDN Transition Learning Model (TLM)™

Conceptualization • Awareness • Recruitment	Stabilization • Oversight • Onboarding	Standardization • Engagement • Competency	Transformation • Empowerment • Skill Optimization
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TLM Transition Plan: Process

- The **Process** dimension focuses on how the activities are brought together during the lifecycle of the project or initiative, e.g. initiation, planning, execution, controlling, closure
- Key indicators under the **Process** dimension are :
 - Risk Assessment
 - Strategic/ Communication Planning
 - Lean Management

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TLM Transition Plan: Process

CDN Transition Learning Model (TLM)™

Conceptualization • Status Reporting • Strategic planning	Stabilization • Escalation Reporting • Policy and procedures	Standardization • Evidence-based Reporting • Roadmap	Transformation • Business Reviews • Playbook
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TLM Transition Plan: Systems

- The **Systems** dimension focuses on tools needed to support the technical and people aspects throughout the project.
- Key elements under the **Systems** dimension include:
 - Patient /Customer Feedback
 - Document Management
 - Finance
 - Inventory & Purchasing

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TLM Transition Plan: Systems

CDN Transition Learning Model (TLM)™

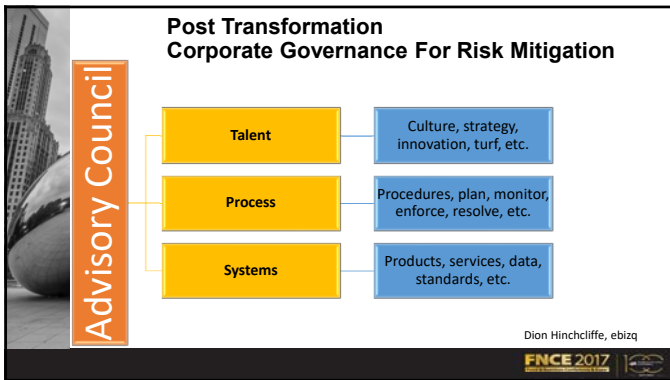
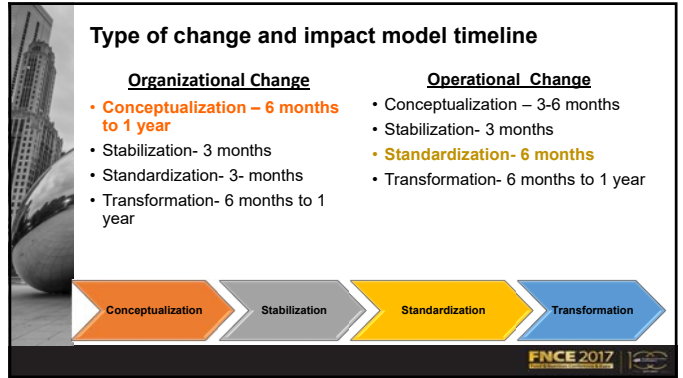
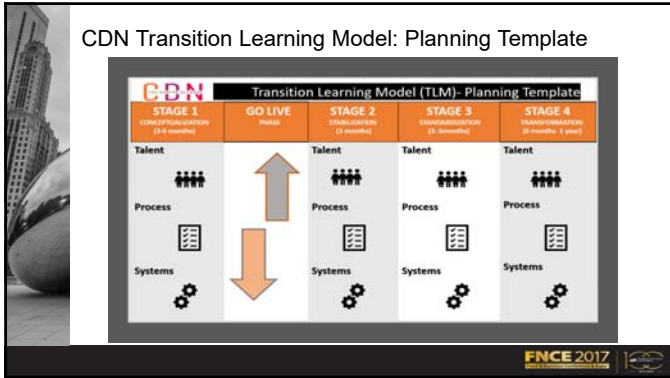
Conceptualization • Demographics • Document management	Stabilization • Issues tracker • Department checklists	Standardization • Satisfaction Survey • Dashboards/scorecards	Transformation • Mystery Shopping • Digital management asset
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What are the four stages in the transition learning model (TLM)?

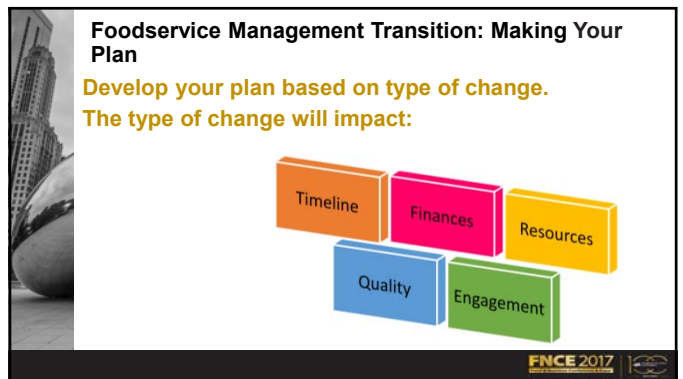
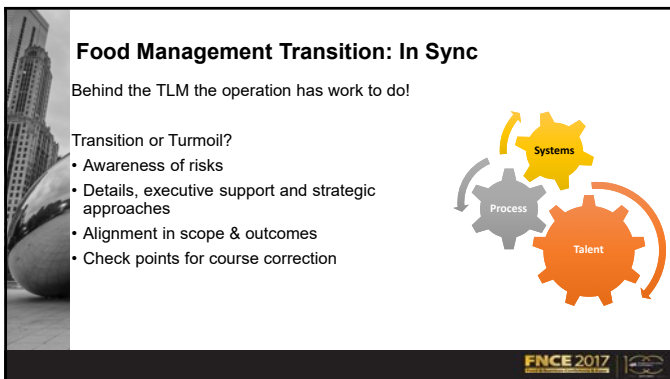
- Planning, Controlling, Framing, Transforming
- Conceptualization, Stabilization, Standardization, Transformation
- People, Process, Tools, Systems
- Strategy, Control, Engagement, Empowerment

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Food Management Transition: Implementing Your Plan

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Food Management Transition: Making Your Plan

Examples of Changes in Hospitality	Potential Impact
Organizational Change	
Physical (New facility/kitchen)	Timeline, Financial, Resources
Operational (self-operations to contract, etc.)	Resources, Timeline, Engagement, Quality
Operational Change	
Menu	Quality
Technology	Timeline, Resources
Service Style, e.g. room service	Engagement, Quality, Resources
Developmental Change	
Recruitment & onboarding	Engagement, Financial
Downsizing or Growth	Financial, Resources

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Food Management Transition: Measuring Your Results

- Implementation of a transition plan should maximize your outcome. Remember to:
 - Set baseline measurements,
 - Define importance and priorities in your **Conceptualization Stage**,
 - Conduct a risk assessment,
 - Set milestones to measure results, quarterly and...
 - Define **success** upfront.



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Food Management Transition: Measure Your Success!

TRANSITION OUTCOME MEASUREMENT INDICATORS®

Factor	Measurement Tool	Current State	Goal	Gap	Q1	Q2	Q3	Q4	Results
Cost Net of Cash / Patient Day	Financial Statement	\$42.50	\$35.25	\$7.25	\$41.00	\$39.00	\$38.00	\$35.80	●
Colleague Engagement	HR/External Tool	Tier 3	Tier 2	1 Tier	N/A	N/A	N/A	Tier 2	●
Customer Engagement	RSA Survey or External Tool	45th %ile	75th %ile	30%	50	62	70	72	●
Food Quality	External Tool	15th %ile	60th % tile	45%	25	35	44	57	●
Safety & Sanitation	Most Recent Inspection/RSA Tool	85 points /100	95 points /100	10 points	85	88	90	95	●
Other Unique Condition	Technology, Turnover, Etc.								

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Which transition stage has been the most challenging for your organization?

- Conceptualization
- Stabilization
- Standardization
- Transformation



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Case Study: Ownership (Organizational) Change

- What:** Transition of operations contract to self-operation*
- Situation:** Management positions plus colleagues change over
- Planning:** HR strategy, leadership engagement, operational assessments, technology support
- Approach:** Team assessment, shadowing, interim management, clear duties and reporting structure, tools and resources identified or developed.
- Important:** Internal support and champions, colleague engagement and trust at Day One

Conceptualization
• Risk assessment

Stabilization
• Analyze risk

Standardization
• Impact assessment

Transformation
• Emergent strategy

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Case Study: System (Operational Change) Transition

- What:** Technology, Services, etc.
- Situation:** Zero Technology & Challenge with Accuracy / Reporting
- Planning:** Designated leadership, time & support from IS/IT and integration collaboration; hire or train internal talent for department
- Approach:** Inter & Intra department teams, product selection team, dedicated resources from Food & Nutrition to focus on project and interface with others, weekly meetings to keep it on track.
- Important:** Time and Testing

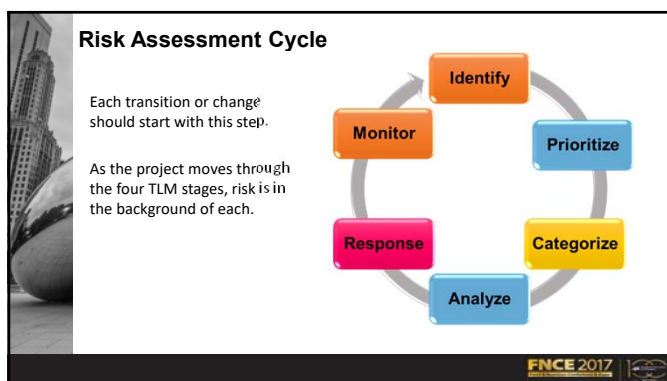
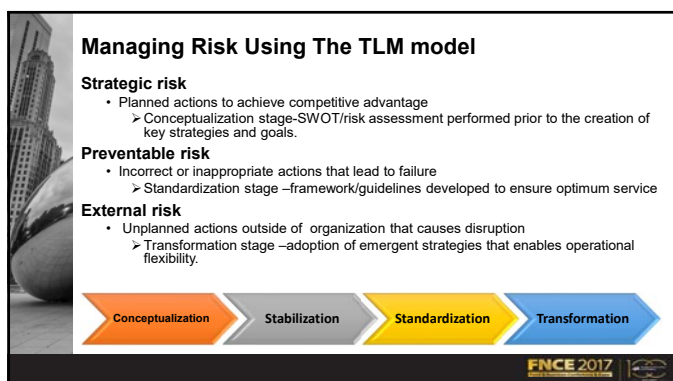
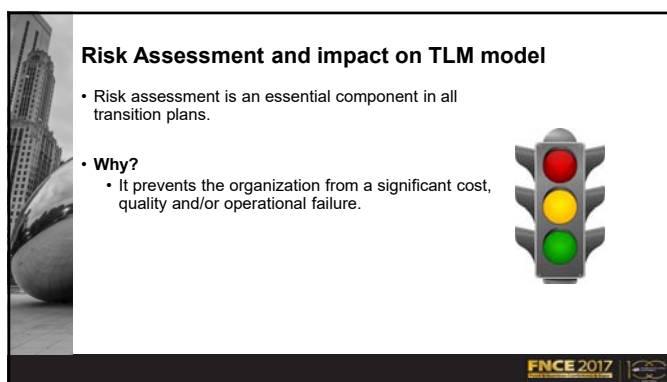
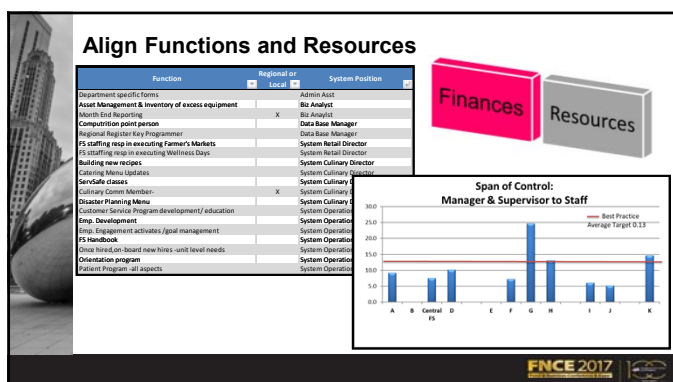
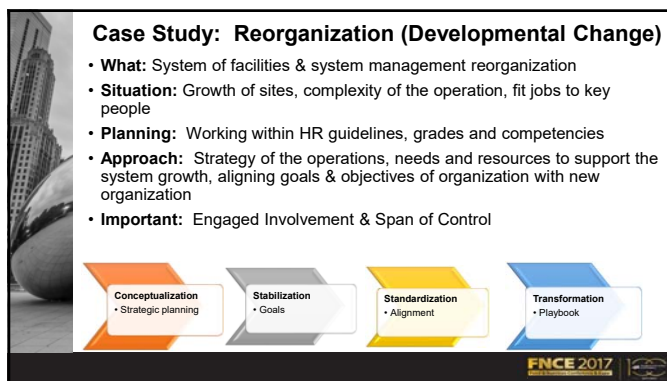
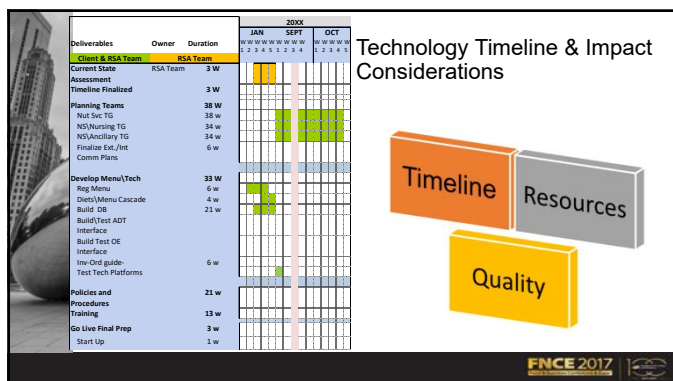
Conceptualization
• Awareness

Stabilization
• Oversight

Standardization
• Engagement

Transformation
• Empowerment

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Why is a risk assessment important in a transition ?

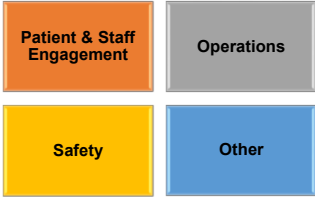
- A. It tells you the cost of transition.
- B. It directs you to do the transition.
- C. It prevents failure of the transition.
- D. It allows leadership to have flexibility.



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Food Management Transition: Quantifying Risk

- Evaluation criteria
- Guiding priorities
- Weighting factors
- Define criteria of risk



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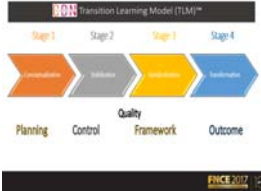
Sample Risk Evaluation Model

Evaluation Criteria	Clinical Support Effectiveness Health Services Efficiency Patient Experience Length of Patient Stay Employee Morale Quality Program/Service Efficiency Financial Impact Startup Community Transition of Operations Implementation of Operations Duration of Transition Financial Impact Safety Equipment, Facilities Capability of Leadership Communication HR & Support
Guiding Priorities	Patient and Staff Experience 38% Operations 40% Patient and Staff Safety 8% Other 14%
Weighting Factor	15% 10% 5% 8% 10% 10% 5% 5% 5% 5% 8% 8% 3% 3% 10%
Department	1 1 2 2 3 4 2 1 1 1 4 1 4 3 7.0%

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What Makes a Successful Transition?

- Your transition plan has to be well thought out with a detailed plan.
- You must focus on the desired outcomes.
- You always celebrate the milestones achieved!
- Your talent is engaged throughout the journey.



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Do you have an appetite for change?





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Thank You!

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