

Unlock the Secret to Achieving Digital Transformation Success With the Delta Framework

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Abstract—Large-scale digital transformations often fail. This article introduces the Delta Framework, which proposes a holistic approach to enhance digital transformation success. Delta integrates the Project Management Institute's Project Management Body of Knowledge (PMBOK), Scrum, and Accelerating Implementation Methodology (AIM) change management methodology from Implementation Management Associates (IMA). While traditional methodologies address cognitive aspects, Delta acknowledges the significance of managing stakeholders' emotions during transformations. AIM evaluates readiness, manages resistance, and establishes sustainable change. Through a practical example of an Electronic Health Record (EHR) project, this article describes how Delta integrates AIM to improve alignment, communication, sponsorship, reinforcement, and continuous optimization. The Framework aligns stakeholder and project objectives, tailors communication to diverse stakeholder needs, establishes a cascading network of sponsors, reinforces desired behaviors, and emphasizes ongoing improvement in stakeholders' well-being. Delta is a comprehensive and adaptive approach addressing cognitive and emotional dimensions for increased digital transformation success. This article also includes specific takeaways, a case study applying Delta, and a worksheet to help managers understand how to use the Framework to assess and improve their digital transformations.

Key words: Agile software development, behavioral science, cognition, collaboration, communication effectiveness, digital transformation, emotional responses, project management, scrum, teamwork, technology management.

INTRODUCTION

LARGE-SCALE digital transformations often fail, with 70% to 95% of projects falling short of their objectives, experiencing delays, and exceeding budgets [1].

Studies also indicate high failure rates for *all* transformation projects, such as cultural, organizational, and supply chain [2]. This suggests that if digital change is not the purpose of many failed transformations, it cannot be the cause.

Project and domain methodologies offer tools and techniques to achieve

successful digital transformation. First is the Project Management Institute's Project Management Body of Knowledge (PMBOK), a global standard that starts with a principles-based structure to accommodate diverse development approaches. It then supplies eight project performance domains emphasizing value-based outcomes. It concludes with a curated set of adaptable tools and techniques for varying project contexts. This integrates with an online platform furnishing supplemental guidance and resources, enriching the methodology with real-world scenarios [3].

Second is Scrum, an Agile framework for software development that is key to IT management. It organizes work into small, cross-functional teams that work in short iterations called sprints. Scrum enables teams to continuously plan, execute, review, and adapt their work, focusing on delivering value-based increments. It fosters continuous improvement through regular sprint reviews and retrospectives. This iterative and adaptive approach empowers teams to respond quickly to changing requirements, resulting in a more customer-centric and responsive development process [4].

Despite applying the powerful tools and techniques included in these methodologies, high failure rates remain. This issue persists because successful projects require something other than cognitive tools and techniques.

People interact with the world involving two essential components: cognition, our thoughts, and emotion, our feelings. PMBOK consists of a structure that logically sequences project activities, engaging cognitive functions such as analysis and planning. Likewise, Scrum highlights adaptive thinking to solve problems quickly, activating cognitive processes for swift decision-making. When confronted with change, people often feel uncertain because they no longer know their future. This uncertainty makes people react emotionally, underscoring why we need a third methodology to manage this response.

Research suggests that adding change management to transformation projects boosts success rates by over 70% [5]. While including emotions is crucial to improvement, managing stakeholder emotions is challenging. Emotions are subjective and vary widely, making them much harder to measure and control than cognitive aspects.

A reliable change management methodology is essential to manage stakeholders' emotions. An analysis of 37 methodologies identified 12 common principles that positively influence success [6]. Given the lack of a widely accepted standard, using a method that employs these 12 principles is crucial.

My company successfully managed digital transformations for about 30 years. We integrated project, IT, and change management disciplines. We adopted PMBOK, Scrum, and Accelerating Implementation Methodology (AIM) from Implementation Management Associates (IMA) for change management. This led to the Delta Framework, which integrates these methodologies described in Fig. 1.

Delta Framework integrates PMBOK, Scrum, and AIM, acknowledging that people interact with the world cognitively and emotionally.

AIM maintains sponsorship is critical to successful change. It evaluates an organization's preparedness for change and manages resistance, a natural reaction to change, not

a malicious effort to stop it. The process concludes with establishing sustainable change by reinforcing desirable behaviors and integrating them into the organization's culture [7].

This article examines how Delta uses AIM's focus on human emotion to enhance PMBOK and Scrum methodologies, increasing digital transformation success rates. Using an Electronic Health Record (EHR) project as a digital transformation example, this article draws on practical experience to explore applying five of the 12 change management principles.

ALIGNMENT

Alignment occurs when stakeholders' objectives synchronize with those of their organization. This increases the chances of achieving successful digital transformation. To measure alignment, a Change Agent, working with project sponsors, surveys stakeholders regularly to assess how well their objectives align with the organization's purpose.

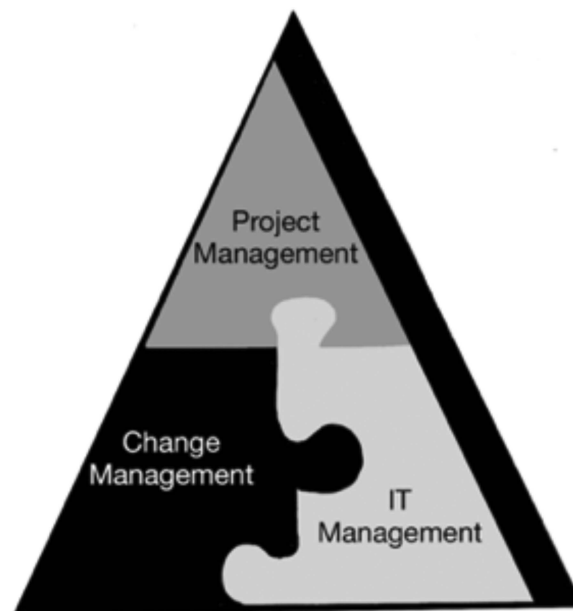


Figure 1. Delta Framework.

Project Management Alignment Without AIM Without AIM, a Project Manager creates an EHR project charter outlining objectives, scope, stakeholders, and deliverables. The charter identifies the project sponsor, who empowers the Project Manager to make critical decisions, allocate resources, and direct project activities. This signals to all stakeholders that the Project Manager has the backing of senior leadership to work across the organization to achieve the project objectives.

Scrum Alignment Without AIM A Scrum team configuring the EHR without AIM sets a specific goal for each sprint to focus on delivering stakeholder value. For example, one sprint goal might be to configure a user-friendly patient portal to improve provider and patient communication. This sprint goal focuses the team's work during the sprint so they deliver features valued most by the stakeholders.

AIM Alignment To start the transformation process, sponsors must define its purpose. This promotes clarity and visibility by explaining what changes are necessary, why they are needed, the consequences of not changing, and the desired behaviors in the future state.

When sponsors introduce a purpose for change in an organization, stakeholders react differently. A Change Agent conducts a readiness assessment to evaluate the impact of these reactions on their beliefs, attitudes, and values, in other words, their confidence in, satisfaction with, and commitment to the project. This helps to determine stakeholders' fears associated with uncertainty and to assess the organization's preparedness. It identifies potential obstacles, tailors collaborative responses to manage resistance, and aligns personal and organizational objectives to ensure successful

project completion. For instance, a readiness assessment can provide insights into the reasons behind the failure of past EHR implementation projects and assist in overcoming those issues in the current project.

Delta Integration and Alignment Delta successfully integrates AIM methodology with PMBOK and Scrum, which leads to improved project performance. AIM's proactive approach to defining changes and assessing readiness helps stakeholders understand how their personal and organizational values align. This helps to identify resistance and how the Change Agent manages it. It also helps to identify stakeholders who align their aspirations with the project's purpose. This information helps the Change Agents manage stakeholders' commitment to achieving and sustaining a common purpose, such as the benefits of implementing an EHR.

Takeaway: Amplify stakeholder alignment with a clear definition of the change and a readiness assessment.

COMMUNICATION

Communication is the exchange of information. Effective communication ensures that stakeholders are well-informed, which builds trust and maintains momentum that contributes directly to successful project outcomes. To measure communication effectiveness, the Change Agent frequently surveys stakeholder satisfaction about its various aspects, such as the level of active meeting participation and frontline staff feedback in the organization's decisions.

Project Management Communication Without AIM An EHR Project Manager, working without AIM, uses, for example, a task board to track the progress of various activities and identifies and overcomes impediments to

timely completion. The board divides work into "To Do," "In Progress," and "Done." The task board is a visual tool that helps teams track work, assign tasks, share information, identify bottlenecks, and improve productivity. Its posting online makes it accessible from anywhere, enhancing communication.

Scrum Communication Without AIM A Scrum Master, also without the benefits of AIM, uses, for example, a Scrum board to manage the progress of a team of software developers configuring the EHR. The board organizes work into "Product Backlog," "Sprint Backlog," "In Progress," "Testing," and "Done." User stories from the product backlog or prioritized requirements move into the sprint backlog during sprint planning. During daily stand-up meetings, team members update the status of their tasks. This visual representation communicates what the team understands what it is working on, what it has completed, and what is next.

AIM Communication Without AIM, opposing stakeholders often debate facts about the merits of the EHR in a never-ending pursuit of win/lose, only addressing cognitive processing and ignoring people's emotional response to uncertainty. AIM maintains that the Change Agent assists in moving the project forward by ensuring that all stakeholders feel that their emotional perspective is understood, respected, and not judged. This requires understanding stakeholders' frame of reference (FOR). This starts by encouraging stakeholders to reflect on their responses to change after justifying them and considering their thought processes. The Change Agent then assists stakeholders in evaluating their methods, questioning their reasoning, and assessing the merits of their arguments. Feeling understood, stakeholders explore their thoughts and motives instead of arguing facts.

Stakeholders must perceive that they work in an environment where sponsors and Change Agents sincerely try to understand their FOR. For instance, in an EHR project, frontline stakeholders may worry about changes in their workflow, whereas administrative stakeholders may appreciate eliminating repetitive and time-consuming tasks. When the Change Agent communicates from stakeholders' FOR, it is not about change based on facts but about understanding and collaborating with people to implement the EHR successfully.

Delta Integration and Communication Delta integration increases insights gained through communication based on stakeholder's FOR. Consider how the Project Manager's understanding of diverse stakeholder needs and expectations allows for personalized presentations on the task board. Tailoring communication to suit senior management's preference for high-level milestones and risks while catering to team members' requirements for detailed task information improves role understanding and task execution.

Similarly, the Scrum Master's understanding of the team's FOR significantly enhances Scrum board management. Aligning the board with developers' technical breakdown and Product Owners' focus on feature development progress or user stories optimizes facilitation, resulting in superior sprint outcomes catering to stakeholders' needs. This approach encourages collaboration, streamlines communication, and improves task execution, increasing project performance because Delta integrated the three methodologies.

Takeaway: Communicate from the FOR of stakeholders to meet their project needs.

SPONSORSHIP

Sponsorship is the formal and informal power legitimizing an

organization's project. As an organizational leader, a sponsor helps a project succeed by endorsing it, providing essential resources, support, and strategic guidance, ensuring alignment with organizational objectives, and removing obstacles that may hinder progress. The Change Agent measures project sponsorship quality by periodically assessing stakeholder satisfaction, such as leaders adhering to project objectives, accepting stakeholder ideas and needs, and making decisions for organization-wide benefit.

Project Management Sponsorship Without AIM Without AIM, the Project Manager works with the EHR executive sponsor, fostering leadership and driving project success. With this support, the Project Manager navigates organizational politics, overcomes roadblocks, and keeps the project on track.

Scrum Sponsorship Without AIM The Scrum Master, on behalf of the sponsor, creates a self-organizing team to configure the EHR software. This team operates independently and continuously improves its processes without the benefit of AIM. The Scrum Master facilitates communication, whereas the Product Owner helps the team deliver value to stakeholders.

AIM Sponsorship According to AIM, sponsors play a crucial role in creating unity and encouraging agreement on established project objectives. To foster this, a Change Agent establishes a chain of sponsors that work together to ensure organization-wide project commitment. The chain includes an Authorizing Sponsor, usually a senior executive, and subordinate Reinforcing Sponsors, who are leaders at lower-ranking levels of the organization.

For example, the Authorizing Sponsor provides top-level support in the EHR project and sets expectations

for change. The subordinate Reinforcing Sponsors bolster this commitment by fostering stakeholder trust. Reinforcing Sponsors build trust by asking themselves why they genuinely see the change differently from their stakeholders and then sharing this reasoning with them in person. This encourages stakeholders to reflect on their thoughts, feelings, and motives and to express their position about the change to sponsors in a trustworthy atmosphere without fear of judgment. This strengthens the sponsor-stakeholder relationship so they can collaborate to achieve project objectives.

Delta Integration and Sponsorship By integrating AIM's chain of Authorizing and Reinforcing Sponsorship with PMBOK and Scrum, Delta cultivates an environment that augments project commitment across the entire organization, increasing the effectiveness of these individual methodologies. On behalf of the project and Scrum teams, an Authorizing Sponsor wields the influence and provides the resources to overcome organizational barriers. Concurrently, Reinforcing Sponsors encourage stakeholders to change themselves, aligning them with the organization's project objectives and reducing resistance. This is important because stakeholders are better persuaded by the reasons they discover themselves than by others.

For example, an EHR Scrum team experiences enhanced value delivery due to the sponsorship chain enabling them to function autonomously, shielding them from distractions, minimizing team turnover, and elevating project performance.

Takeaway: Implement a cascading network of Authorizing and Reinforcing Sponsors to drive change adoption.

REINFORCEMENT

Reinforcement is actions or processes that motivate specific behaviors. Reinforcement strengthens behaviors and encourages team members to achieve and sustain project success. To evaluate the effectiveness of reinforcement, the Change Agent conducts frequent surveys to assess whether stakeholders engaging in activities like mentoring or using training materials achieve intended behavioral changes.

Project Management Reinforcement Without AIM

The Project Manager, without AIM, continuously monitors stakeholder project engagement levels. They reassess stakeholder needs and adjust communication and engagement strategies accordingly. For example, suppose feedback indicates stakeholders need to be more fully engaged. The Project Manager might organize additional meetings or workshops to gather and respond to stakeholder concerns while reiterating the benefits and objectives of the EHR project.

Scrum Reinforcement Without AIM

Without AIM integration, the Scrum Master reinforces stakeholder buy-in with short, iterative sprints, giving customers frequent opportunities to see the incremental configuration changes to the EHR. After each sprint, the Scrum Master conducts a review meeting where stakeholders see the tangible results of their involvement and provide feedback. This iterative process helps to align the EHR with user needs, fostering ownership among stakeholders and reinforcing their project commitment.

AIM Reinforcement AIM maintains that reinforcement includes three progressively stronger strategies for achieving commitment. The first is to express, which occurs when sponsors directly acknowledge a desired behavior using words to give

immediate positive feedback. The second is to model, which arises when sponsors demonstrate a behavior they want stakeholders to adopt. The third and most potent is to reinforce, where sponsors provide consequences immediately after a behavior to increase the likelihood of repeating a desired outcome.

For instance, eliminating paper requisition orders from nurses' stations compels physicians to use the EHR, making it easier to adopt the new behaviors instead of finding and using requisition forms supporting the status quo. This creates a reinforcing environment where stakeholders adopt project objectives.

Delta Integration and Reinforcement

Motivating stakeholders to embrace new habits and abandon old ones requires consistent reinforcement strategies to communicate desired behaviors that are easier to perform than the current ones. For instance, in a group setting, a person who dominates the conversation can hinder full group engagement and collaboration. To overcome this challenge, a facilitator, such as a Project Manager during a team meeting or a Scrum Master during a retrospective session, can restate what the dominator says and ask the rest of the group for their thoughts. By doing so, the facilitator reinforces the power of the group to engage and collaborate, encouraging the dominator to adopt a new and more collaborative behavior that is easier to follow than the old one.

This approach is used in both PMBOK and Scrum to cultivate an environment where desired practices become ingrained because they are easier to do than the status quo. Ultimately, this leads to increased project success and stakeholder satisfaction.

Takeaway: Express, model, and reinforce desired behaviors that are easier to perform than the status quo.

CONTINUOUS OPTIMIZATION

Continuous optimization is the ongoing and systematic enhancement of processes, products, services, or outcomes. Continuous optimization encourages a learning, innovation, and responsiveness culture, enabling sustained improvement during and after project completion. To measure continuous optimization, the Change Agent surveys stakeholders regularly to determine if leadership encourages innovation and embraces the learning opportunities that come with failure.

Project Management Continuous Optimization Without AIM

The Project Manager constantly improves the project by collecting and using insights without relying on AIM. For example, to achieve this in the EHR project, the Project Manager holds team meetings regularly where stakeholders express their ideas and issues related to necessary improvements. This leads, for example, to augmenting the user interface, functionality, and EHR integration with other systems.

Scrum Continuous Optimization Without AIM

The Scrum Master, without AIM, divides the project work into sprints, where the team configures a product increment, reviews it, and adapts it based on feedback about the process and the product. For example, in one sprint, the team might focus on configuring a module for medication management. After the sprint, they demonstrate it to stakeholders, gather feedback, and make necessary adjustments in the next sprint. This iterative approach helps the Scrum team continually refine and align the EHR with user needs.

AIM Continuous Optimization

AIM focuses on optimizing transformation within an organization's culture even after the project ends. This starts by establishing human objectives

that maintain and enhance project outcomes. It also includes defining exactly how and when stakeholders will achieve those objectives, providing feedback on their progress, and when and how often that will happen.

Human objectives are targets stakeholders work towards, which improve their well-being. These objectives may include personal

growth, career progression, education, relationships, and health. When sponsors connect with what stakeholders value, it encourages sustained action that improves them and the transformation. For example, training EHR staff while reducing the time taken from their daily tasks to attend these educational opportunities and practice afterward can help improve their skills. In contrast, staff are

often expected to complete training and practice without a reduction in their regular duties. This human objective demonstrates how a sponsor motivates stakeholders to change and improve themselves.

Delta Integration Continuous Optimization Achievement of human objectives is crucial to ongoing optimization in digital transformations. For example,

Table 1. Delta Integration Worksheet.

Principles	Current findings	AIM tools and techniques	AIM corrective actions with Delta integration
Alignment	Campaigning to implement a Correctional Health EHR is not a substitute for defining the change and aligning the organization to achieve it	Define the change and administer a readiness assessment at project start	For the project to be successful, the Project Manager, Change Agent, and Scrum Master must have a clear understanding of what motivates stakeholders and create experiences that meet these needs. Therefore, it is crucial to begin the project by defining what must change, why the change is necessary, what the consequences of not changing are, and what the desired behaviors should be in the future state. Conducting a readiness assessment can also help evaluate Correctional Health's preparedness for this change and help stakeholders align their objectives with the project's purpose.
Communication	The Sheriff supports Correctional Health's digital transformation but fails to consider the FOR of stakeholders	Communicate with stakeholder from their FOR to help them self-change	A Change Agent, on behalf of sponsors, must communicate with stakeholders based on their FOR instead of through consultants. In Scrum, eliciting and understanding stakeholders' needs from their FOR improves requirements gathering. In PMBOK, understanding stakeholder needs from their FOR helps gather accurate and relevant information to enhance planning, scope definition, and management throughout the project lifecycle.
Sponsorship	The Sheriff strongly supports Correctional Health's digital transformation, but there is no chain of sponsorship	Implement a cascading chain of Authorizing and Reinforcing Sponsors	Establishing a committed chain of sponsors who authorize and reinforce from the frontline to the top of Correctional Health is crucial to guiding stakeholders through their thoughts and motives about change. Every stakeholder has their perspective and understanding of the change. Sponsors must communicate with stakeholders from their FOR, creating a trustworthy environment where stakeholders express and justify their thoughts and emotions about the change without judgment. This strengthens the relationship between sponsors and stakeholders to collaborate on achieving digital transformation instead of debating factual differences. PMBOK and Scrum also benefit from clear hierarchies of sponsorship because accountability for project success is explicit at all levels of Correctional Health, enabling improved role definition for project management success.
Reinforcement	A campaign promise to transform Correctional Health digitally is not the reinforcement essential for sustained beneficial change	Express, model, and reinforce desired behaviors that are easier to perform than the status quo	Correctional Health sponsors can improve the execution of Scrum and PMBOK by promoting desired behaviors that are easier to perform than existing ones. For instance, the Project Manager encourages the equivalent of a Scrum daily standup throughout the project, or a short, time-boxed event where project team members update each other on their progress. This is easier to adopt than the status quo. Traditional weekly status meetings that run long, disrupt work schedules, lack focus, lead to passive participation, and delay decision-making.
Continuous Optimization	The Sheriff committed to implementing continuous optimization for Correctional Health use of the EHR without the benefit of setting achievable human objectives	Achieve human objectives to foster a culture of sustained change	It is crucial to include human objectives in Correctional Health's EHR project to help ensure its long-term success. When stakeholders have meaningful human objectives, it enhances their motivation and dedication, leading to better performance of the Scrum team and successful completion of sprints. Similarly, in PMBOK, including such objectives can increase project engagement and commitment, boost motivation, and result in sustained performance for the Correctional Health EHR, even after project completion.

well-defined project objectives are essential for project and Scrum team members and other stakeholders to develop and follow as a roadmap for success. Ensuring these objectives are realistic motivates these teams to achieve project success. Strong human resource management guaranteeing the availability of the right amount of required skills at the correct time during project tasks is also critical to fostering a positive work environment. These factors are based on achieving stakeholders' well-being, contributing to ongoing value optimization after project completion.

Takeaway: Employ continuous optimization based on achieving human objectives to help the organization sustain change.

CASE STUDY

The following case study demonstrates how Delta uses AIM to enhance PMBOK and Scrum to improve digital transformation success. Table 1 evaluates the case study, but it is not comprehensive, so please supplement it with your observations and use this worksheet for your projects.

A newly elected Sheriff won based on a promise to implement an EHR for Correctional Health services in the county jail. Consultants collected EHR requirements during interviews with individuals in the Sheriff's Correctional Health Unit, prepared the solicitation, and recommended a specific vendor's solution using the public procurement process.

Even though the Sheriff planned to fund the EHR implementation, clinicians, inmates, and their families opposed the selected product. County IT maintained they could build a custom solution at a lower cost. The Sheriff said she expected the vendor to customize their solution to meet the Unit's needs. She appointed a permanent Optimization Response team to serve the project and take advantage of continuous optimization opportunities afterward.

CONCLUSION

This article introduces the Delta Framework, which integrates PMBOK, Scrum, and AIM methodologies to improve project outcomes. The Framework highlights the importance of integrating human emotion with cognition to increase the success rate of digital transformations.

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