

SharePoint Administrator Certification Program

Change Management Strategy — Strategy & Design Phase Case Study

PORTFOLIO CONTEXT: This case study documents the change management strategy and design work I led for a SharePoint knowledge repository standardization and administrator certification program at a Fortune 100 financial services organization. My direct scope covered strategy development, PCT assessment, stakeholder analysis, ADKAR roadmap design, certification curriculum design, and communication strategy recommendations. Execution and go-live (March 2026) were handed off to the receiving team. This artifact demonstrates my application of Prosci ADKAR methodology integrated with instructional design to address both the people side and the capability-building side of change in a distributed, regulated environment.

Project / Initiative Name	SharePoint Administrator Certification & KM Governance Standardization
Executive Sponsor	GBS Leadership Coalition (Heads of Distribution, Strategy/Solutions/Marketing, Service, Underwriting, Finance)
Change Manager — Strategy & Design	Samiya Hai
Project Timeline	Kickoff August 2025 Go-Live March 2026 Sustained Outcomes December 2026
Impacted Population	~3,000 GBS employees enterprise-wide; ~100 certified as SharePoint Administrators across 5 business units
Industry	Financial services (regulated, enterprise, distributed workforce)

1. Change Overview

1.1 Change Description

Teams across five business units operated fragmented SharePoint environments with inconsistent governance, duplicated content, and findability issues. This created security and compliance exposure, productivity loss, and inconsistent information supporting member-facing activities.

What is changing?

Migration to standardized SharePoint repositories with consistent taxonomy, templates, and governance across all five GBS business units. Establishment of a certified SharePoint Administrator role (2 per business unit) accountable for upholding KM standards. Implementation of SmartSearch as the single source of truth for enterprise knowledge discovery.

Why is this change happening?

Content duplication, governance gaps, security and compliance risk, and poor findability across fragmented SharePoint environments were increasing organizational risk and degrading employee productivity. Regulatory expectations for information governance in financial services require standardized, auditable knowledge management practices.

What happens if we don't change?

Continued security and compliance exposure, ongoing productivity loss from poor findability, inconsistent information reaching member-facing teams, and growing technical debt in decentralized SharePoint environments.

1.2 Change Characteristics Assessment

Change characteristics were assessed to calibrate the level of change management effort required. This initiative was assessed as High Complexity, requiring a robust sponsor coalition, phased rollout, and embedded capability-building across five business units.

Characteristic	Assessment	Impact on CM Strategy
Scope (breadth of impact)	Enterprise-wide across all GBS business units	Required coalition sponsorship across 5 BU heads; cross-BU governance working group
Scale (number impacted)	~3,000 employees aware; ~100 certified administrators	Differentiated CM approach: awareness-level comms for broad population, deep enablement for certified cohort
Duration	Phased: Aug 2025 – Dec 2026 (17 months to sustained outcomes)	Long duration required sustained reinforcement plan and rolling cohort certification approach
Complexity	High (governance + system + role change + cross-functional)	Required integrated CM and ID approach; certification program with assessed proficiency
Cultural Readiness	Medium-Low (PCT scored CM leg at 10 — high-risk)	Required early sponsor coalition formation and active resistance management planning
Change History	Prior decentralized ownership; mixed prior KM initiative outcomes	Required differentiated WIIFM messaging and early quick wins to build credibility

PCT ASSESSMENT FINDINGS: Leadership/Sponsorship scored 14, Project Management scored 11, and Change Management scored 10 — all in the high-risk (red) zone. This informed the prioritized recommendations: (1) recruit a sponsor coalition and provide them with a sponsor plan and key asks, (2) request dedicated PMO resources, (3) establish pre and post evaluations for adoption and usage with clear objectives. The PCT findings shaped the governance and resource recommendations presented in Section 8.

2. Stakeholder Strategy

2.1 Stakeholder Mapping

Seven stakeholder groups were identified across the initiative. Direct engagement during the strategy and design phase focused on the KM Team (co-design partner) and the cross-GBS KM Working Group. Engagement approaches for the broader stakeholder population were designed and documented for execution-phase ownership.

Stakeholder Group	Current State	Desired State	Engagement Approach	Priority
GBS Executive Leadership Coalition	Aware, endorsing	Active sponsor coalition	Sponsor coalition meetings, PCT review, sponsor plan with key asks	High
KM Team (direct partner)	Engaged partner	Co-design lead for execution	Joint design sessions, shared governance model, certification curriculum co-design	High
KM Working Group across GBS	Informed	Aligned governing body	Cross-BU working group meetings, standards review, change log ownership	High
People Managers (5 BUs)	Unaware	Change advocates for their teams	Roadshow, manager toolkit, talking points (recommended for execution)	High
Future SP Administrators (~100)	Unaware	Certified and confident in governance role	Certification program, focus groups, WIIFM sessions, cohort-based learning	High
General GBS Employees (~3,000)	Unaware	Aware of new structure, know where to go	Awareness comms cascade through managers (recommended for execution)	Medium
IT (KM-managed)	Informed via KM	Coordinated technical support	Technical coordination via KM team; escalation paths documented	Medium

ENGAGEMENT SCOPE: During the strategy and design phase I led, direct stakeholder engagement focused on the KM Team and the cross-GBS KM Working Group as co-design partners. Engagement strategies for executive sponsors, people managers, future administrators, and the broader GBS employee population were

designed and documented as recommendations for the execution phase. This scoping reflects the realistic division of labor on a long-duration, multi-BU initiative.

2.2 Sponsor Roadmap

The PCT assessment identified Leadership/Sponsorship as a high-risk area (scored 14). The sponsor roadmap below was designed to mobilize the GBS Leadership Coalition as active sponsors rather than passive endorsers.

Phase	Sponsor Actions	Deliverables	Frequency
Initiate	Form coalition, authorize resources, endorse vision across 5 BUs	Coalition charter, kickoff message, roadshow sponsor video	One-time + as needed
Plan	Approve strategy, engage peer sponsors, unblock resourcing constraints	Strategy sign-off, resource authorization, PMO engagement	Bi-weekly check-ins
Execute	Visible participation at roadshow events, reinforce expectations to BU leaders	Site visits, video messages, quarterly all-hands mentions	Weekly touchpoints during go-live
Sustain	Celebrate certification milestones, reinforce governance expectations	Recognition program, adoption metrics review, BU-level accountability	Monthly reviews

3. ADKAR-Based Change Management Plan

Change management activities were mapped to the Prosci ADKAR Model to ensure each phase addressed specific employee barrier points. Activities I directly designed are noted alongside activities recommended for execution-phase ownership. Instructional design integration is called out at each phase; the dual CM + ID lens was central to how this certification program was architected.

3.1 Awareness

Target Outcome: GBS employees and leaders understand WHY SharePoint governance standardization is necessary and what's at risk if fragmentation continues.

Activity	Deliverables	Audience	Owner
PCT Assessment (completed)	PCT report with risk analysis and prioritized recommendations	GBS Leadership Coalition	CM Lead (designed & delivered)
Leadership coalition briefing	Briefing deck, talking points, key asks document	5 BU heads	CM Lead (designed & delivered)
Awareness campaign (designed)	Email series, intranet articles, digital signage	All ~3,000 GBS employees	Recommended: KM Team + Comms
Roadshow (designed)	Roadshow deck, facilitator guide, WIIFM segments by BU	People managers, future SP admins	Recommended: KM Team + CM

Instructional Design Integration: Audience segmentation by role (executive, manager, future administrator, general employee); pre-assessment design for readiness measurement; messaging differentiation by business unit context.

3.2 Desire

Target Outcome: Future SharePoint Administrators and people managers participate and champion the new governance model.

Activity	Deliverables	Audience	Owner
Focus groups (designed)	Focus group protocol, pain point inventory, WIIFM themes by role	Future SP admins, sample managers	Recommended: KM + CM partnership
WIIFM messaging by role (designed)	Role-specific impact statements, benefits messaging	Administrators, managers, general population	Designed by CM Lead
Resistance management plan (designed)	Resistance indicators, intervention matrix, escalation paths	KM Team for execution	Designed by CM Lead
Manager coaching approach (designed)	Manager conversation guides, coaching framework	People managers across 5 BUs	Recommended: KM Team

Instructional Design Integration: Persona development for the certified administrator role; motivation design connecting certification to professional credential value; resistance pattern anticipation based on prior initiative history.

3.3 Knowledge

Target Outcome: Certified SharePoint Administrators know HOW to uphold KM governance standards; general employees know HOW to find content and use standardized repositories.

Activity	Deliverables	Audience	Owner
Certification curriculum (designed)	Learning paths, blended delivery design, facilitator guides	~100 future SP administrators	Designed by L&D
Cohort-based certification structure (designed)	Cohort schedule, progression framework, assessment approach	~100 future SP administrators	Designed by L&D + KM
Quick reference guides (recommended)	Job aids for governance rules, tagging standards, templates	All administrators + general users	Recommended: KM Team + L&D
Knowledge assessments (designed)	Pre/post knowledge checks, certification exam framework	Certification cohort participants	Designed by L&D

Instructional Design Integration: Curriculum design mapped to certification competencies; cohort-based blended learning model balancing governance content with hands-on system skills; assessment design for credentialing rigor appropriate to a governance role.

3.4 Ability

Target Outcome: Certified administrators CAN apply governance standards in their daily work; general employees CAN navigate standardized repositories and use SmartSearch effectively.

Activity	Deliverables	Audience	Owner
Practice environment (recommended)	Sandbox SharePoint environment for certification practice	Certification cohort participants	Recommended: KM + IT
Go-live support (recommended)	Support schedule, escalation path to KM Team	All users during transition	Recommended: KM Team
Peer cohort structure (designed)	Cohort peer coaching model, buddy pairing criteria	Certification cohort participants	Designed by L&D + KM
Governance observation framework (designed)	Observation rubric for certified administrators applying governance	KM Team + admin managers	Designed by L&D + KM

Instructional Design Integration: Practice environment design connecting training scenarios to real governance decisions; performance support tool design (decision trees for governance edge cases); observation rubric design for post-certification reinforcement.

3.5 Reinforcement

Target Outcome: Governance standards STICK — certified administrators continue to apply standards, teams don't revert to decentralized practices, SmartSearch becomes the default for knowledge discovery.

Activity	Deliverables	Audience	Owner
Adoption metrics framework (designed)	Pre/post evaluation design, metrics definitions, dashboard structure	Leadership + KM Team	Designed by CM Lead
Recognition approach (designed)	Administrator milestone recognition, BU-level celebration triggers	All certification cohorts	Recommended: KM + HR
Continuous certification model (designed)	Recertification cadence, ongoing learning requirements	All certified administrators	Designed by CM Lead
Lessons learned capture (recommended)	Cohort retrospectives, governance edge case knowledge base	Project team + administrators	Recommended: KM Team

Instructional Design Integration: Post-training evaluation design at Kirkpatrick Levels 3 (behavior) and 4 (business results — measured via SmartSearch adoption and governance audit outcomes); sustainability analysis built into the recertification cadence.

4. Communication Strategy Overview

Communications were sequenced to build awareness across the ~3,000-person GBS population before deepening engagement with the ~100 future administrators. In a distributed, multi-BU environment, cascade through people managers was essential to ensure local relevance and credibility.

ADKAR Phase	Key Messages	Channels	Sender	Cadence
Awareness	Why governance matters; risk of fragmentation; what's changing at the enterprise level	Leadership video, intranet, digital signage, BU all-hands	GBS Leadership Coalition	Kickoff + ongoing through Aug-Oct 2025
Desire	WIIFM for administrators (credential, expertise); WIIFM for managers (better team access to information)	Roadshow, manager 1:1s, team meetings	Managers + KM Team	Oct 2025 – Jan 2026
Knowledge	Certification program access, curriculum, cohort schedule	Targeted email, LMS notifications, manager cascade	KM Team + L&D	Jan – Feb 2026
Ability	Go-live details, support resources, escalation paths	Targeted email, KM support channels	KM Team	March 2026
Reinforcement	Administrator spotlights, governance wins, SmartSearch adoption milestones	Intranet, BU newsletters, recognition events	Sponsor + KM Team	Ongoing through Dec 2026

5. Training and Learning Strategy

The certification program was the centerpiece of the training strategy. This is where my dual expertise in change management and instructional design was most directly applied. The certification was architected not just as a training deliverable, but as a credentialing system that creates sustained governance capability across the organization.

Component	Approach	Delivery Method	Timeline
Audience / Learner Analysis	Role analysis for SP admin competencies; current-state skill mapping for ~100 nominees across 5 BUs	KM Team interviews, competency framework, nominee skill survey	Aug – Sep 2025

Component	Approach	Delivery Method	Timeline
Curriculum Design	Learning objectives mapped to governance competencies and ADKAR Knowledge + Ability milestones	Storyboards, facilitator guides, practice scenarios, assessment blueprint	Oct – Dec 2025
Delivery	Blended: eLearning foundations + cohort-based VILT + practice environment + peer coaching	LMS for foundations; cohort VILT for deep skill-building; sandbox for practice	Jan – Feb 2026
Assessment	Pre/post knowledge checks; certification exam; post-certification governance observations by KM Team	LMS quizzes, scored exam, observation rubric	Throughout + post-certification
Evaluation	Kirkpatrick L1-L4: participant reaction, certification pass rate, governance application observed, SmartSearch adoption business outcome	Surveys, assessment data, audit data, usage analytics	30-60-90 days post go-live + ongoing

DIFFERENTIATOR — CM + ID INTEGRATION: This initiative illustrates why integrating change management and instructional design matters. A standard CM approach would have produced an awareness campaign and handed training to L&D. An integrated approach architected the certification itself as a behavioral reinforcement mechanism — the credential creates accountability, the cohort model creates peer support, and the recertification cadence creates sustained governance capability. The training isn't a deliverable; it's the change mechanism.

6. Risk and Resistance Management

6.1 Change Risk Assessment

PCT scores in all three legs (Leadership 14, PM 11, CM 10) indicated high risk at initiation. The risks below reflect the material issues that surfaced during the strategy and design phase and the mitigations I designed or recommended.

Risk	Likelihood	Impact	Mitigation Strategy	Owner
Sponsor coalition fragmentation across 5 BU heads	Med	High	Joint PCT review to create shared risk picture; coalition charter with explicit commitments; bi-weekly coalition meetings	CM Lead
Learning design complexity (governance + system + role skills)	High	High	Modular curriculum design separating governance content from system skills; cohort model allowing peer support on complex scenarios	CM Lead
Timeline shifts driven by stakeholder capacity	High	Med	Buffered roadmap with phase-gated milestones; explicit dependency documentation; scope contingency for cohort size	CM Lead + PMO
Competing priorities across BUs reducing stakeholder bandwidth	High	High	Sponsor-level prioritization at coalition meetings; WIIFM messaging targeted to BU-specific wins; phased BU rollout option	Sponsor Coalition
Execution handoff continuity (post my scope)	Med	High	Comprehensive strategy documentation; handoff meetings with KM Team; recommendation log with rationale for execution decisions	CM Lead + KM Team

6.2 Resistance Management Approach

The biggest resistance themes anticipated during strategy and design were centered on learning design complexity, timeline pressure, and competing priorities. The intervention framework below was designed to address root causes rather than symptoms.

Root Cause	Indicators	Intervention
Complexity overwhelm (certification scope perceived as too much)	Questions about time commitment; pushback on cohort length	Modular curriculum design; clearly staged competencies; transparency about what's required when
Timeline pressure creating stakeholder fatigue	Missed working group meetings; deprioritization signals	Sponsor-level escalation; timeline renegotiation when warranted rather than forcing through
Prior decentralized governance = loss of local autonomy	"We had our own way of doing this" comments	Involve business units in governance standards design; preserve BU flexibility within enterprise standards where possible
Role change anxiety for future administrators	Nomination hesitance; questions about ongoing time commitment	Clear role charter; manager endorsement as part of nomination; recertification cadence predictable

Root Cause	Indicators	Intervention
Change fatigue from prior KM initiatives	"We've seen this before" cynicism	Differentiate through PCT-informed approach; deliver early quick wins via pilot cohort before broad rollout

7. Measurement and Adoption Tracking

The measurement framework was designed to track leading indicators (engagement, readiness, certification completion) and lagging indicators (governance application, SmartSearch adoption, audit outcomes) across all five ADKAR milestones. Pre/post evaluations were a direct PCT-driven recommendation.

ADKAR Phase	Metric	Data Source	Target	Frequency
Awareness	% of GBS employees who can articulate the change and its purpose	Pulse survey (pre/post roadshow)	>75% by Feb 2026	Pre-launch + monthly
Desire	% of nominated administrators confirming participation; manager endorsement rate	Nomination tracking, manager survey	>90% confirmed	Nomination phase
Knowledge	Certification curriculum completion rate; certification exam pass rate	LMS data, exam results	>95% completion, >80% pass	Weekly during cohort
Ability	% of certified admins demonstrating governance application in observed practice	KM Team observation rubric	>75% at 30 days post-cert	30-60-90 days post-certification
Reinforcement	SmartSearch adoption; governance audit outcomes; recertification participation	SmartSearch analytics, KM audit data	>70% SmartSearch use; 0 critical audit findings	Quarterly post go-live

MEASUREMENT PHILOSOPHY: The PCT assessment explicitly flagged the absence of pre/post evaluation as a high-risk gap for this initiative. The measurement framework above was designed to close that gap — moving beyond certification completion (a common and inadequate metric) to measure actual governance application and business outcomes. Certification completion tells you people passed an exam; observed governance application tells you the change actually happened.

8. Governance and Timeline

8.1 Governance Structure

Role	Responsibility	Meeting Cadence
GBS Leadership Coalition (5 BU heads)	Executive sponsorship, barrier removal, BU-level accountability	Bi-weekly with CM Lead; monthly full coalition
Change Management Lead (strategy & design)	Strategy development, PCT assessment, stakeholder analysis, ADKAR roadmap, certification design	Ongoing through handoff
KM Team (execution partner)	Curriculum co-design, certification program operation, ongoing governance	Weekly sync with CM Lead during design phase
KM Working Group across GBS	Cross-BU standards alignment, governance decisions, change log ownership	Bi-weekly working group

Role	Responsibility	Meeting Cadence
PMO Resource (recommended)	Timeline, dependencies, resource coordination across BUs	Weekly sync (recommended)

8.2 High-Level Timeline

Phase	Duration	Key CM Activities	Key Milestones
Assess and Plan	Aug – Oct 2025	PCT assessment, stakeholder analysis, strategy development, sponsor coalition formation	Strategy approved; coalition chartered; PCT findings reviewed
Design	Oct – Dec 2025	Certification curriculum design, communication plan, resistance management plan, measurement framework	Curriculum complete; comms calendar finalized; handoff materials prepared
Prepare (execution handoff)	Jan – Feb 2026	Roadshow delivery, manager enablement, first cohort enrollment	Roadshow complete; first cohort enrolled; KM Team owns execution
Deploy	March 2026	First certification cohort launch; SmartSearch go-live; initial governance rollout	First cohort launched; go-live complete
Sustain	March – Dec 2026	Rolling cohort certification; adoption monitoring; sustained governance reinforcement	Adoption targets reached; BAU transition complete

SCOPE TRANSPARENCY: My direct ownership spanned the Assess, Plan, and Design phases (August 2025 – early 2026), with strategy and design handoff to the KM Team for execution. The first certification cohort launched in March 2026 as planned. This case study reflects the strategy and design work I led; execution outcomes are not claimed as personally owned. This scoping is typical for Lead Change Manager roles on long-duration initiatives where strategic architecture is handed off to operational teams for sustained execution.

What This Case Study Demonstrates

This case study demonstrates capability across four areas a Lead Change Manager role requires:

- Applied Prosci methodology on a real enterprise initiative:** Used PCT assessment, ADKAR roadmap, sponsor coalition development, and cascade communications on a 17-month, 3,000-person, 5-BU initiative in a regulated financial services environment.
- Led stakeholder analysis and engagement planning:** Mapped 7 stakeholder groups, designed differentiated engagement approaches, and navigated cross-BU coalition dynamics when prioritization was contested.
- Designed a credentialing program, not just training:** Architected the certification program as a behavioral reinforcement mechanism by integrating change management and instructional design principles — the credential, the cohort model, and the recertification cadence were all deliberate choices to create sustained governance capability.
- Built a measurement framework that moves beyond compliance:** Designed pre/post evaluations across all five ADKAR milestones (directly addressing a PCT-identified high-risk gap), with Kirkpatrick L3/L4 outcome measures tied to SmartSearch adoption and governance audit results.

Portfolio Case Study — SharePoint Administrator Certification Program. Change management strategy and design phase led by Samiya Hai. Execution outcomes attributable to the KM Team. For the complete portfolio and additional case studies, visit samiyalxd.com.