

Prosci change management webinars

Best Practices Audit *How do you score?*

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About **Prosci**®

Our value proposition:

To help organizations build **their own internal change management competencies** through the development and delivery of tools and methodologies

Our principles:

Research-based | Holistic | Easy-to-use

Prosci by the numbers:

- 6 Longitudinal studies
- 12 Years of research
- 66% Fortune 500 companies
- 2000+ Research participants
- 4000+ Certified practitioners
- 45,000+ Registered members

About **Prosci**® webinars

Webinar purpose:

- Educational
- Thought provoking
- Insights into new development
- New ideas, phraseology, language, and frameworks
- **Give you at least one hour per week to think about change management**

Tools or downloads referenced in this free webinar are for webinar educational purposes; reproduction or distribution of these tools in your organization will require additional steps on your part.

Prosci's channels:

- Published products and tools
- Web-based tools and applications
- Face-to-face training
- Train-the-Trainer

Prosci's target audiences:

- Change management specialists
- Project teams and leaders
- Executives and senior leaders
- Managers and supervisors

Contact:

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Email Support – webinar@prosci.com
Webinars are presented by Tim Creasey, Prosci Chief Development Officer

Agenda

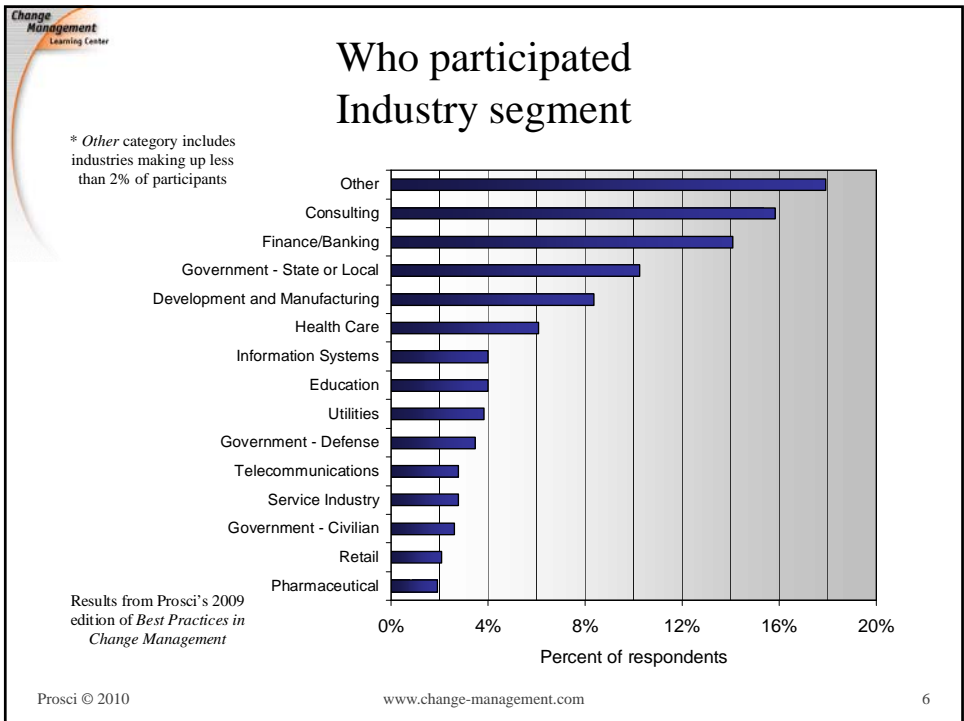
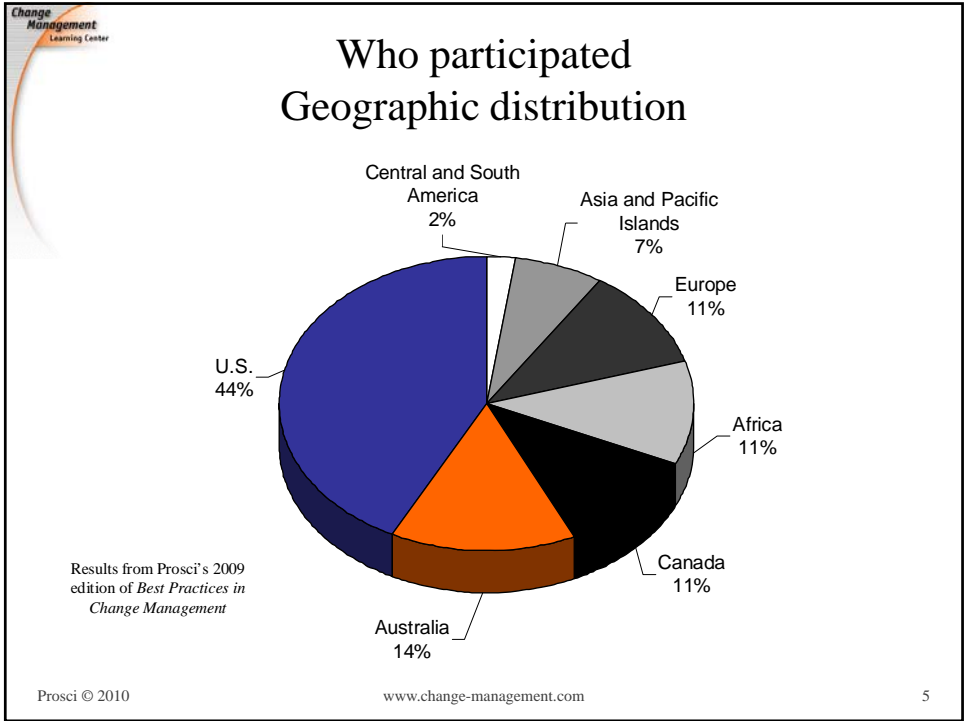
- Report foundation
- Top 5 contributors
 - What is the factor?
 - What does it mean to you?
- How do you score on the Best Practices Audit?

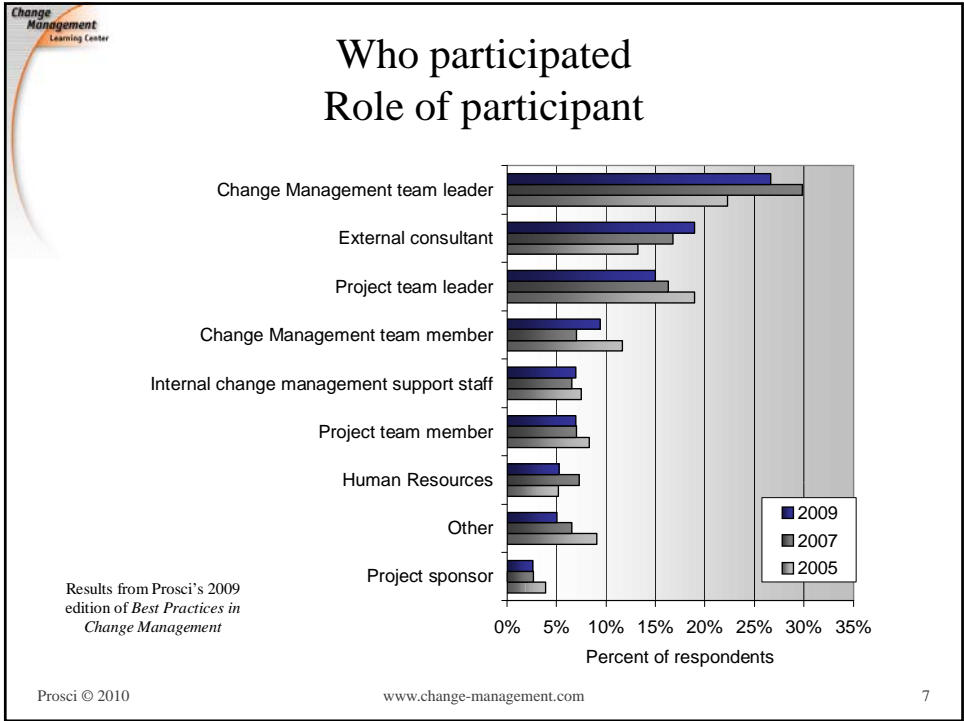


Report foundation 6th longitudinal study

- 1998** First Change Management Study – 102 participants
- 2000** Second Change Management Study – 152
- 2003** Third Change Management Study – 288
- 2005** Fourth Change Management Study – 411
- 2007** Fifth Change Management Study – 426
- 2009** **Sixth Change Management Study – 575**

** Next study launching at the end of 2010 or early 2011*





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Report foundation

- Goal of benchmarking study:
 - *The objective of this study is to uncover lessons learned from practitioners and consultants so current change management teams can benefit from these experiences*
 - Build on findings from previous five studies over the last decade (2007, 2005, 2003, 2000, 1998)

Topics covered:

- Greatest contributors to success
- Greatest change mgmt obstacles
- What to do differently next time
- Change mgmt effectiveness
- Methodology
- Change management activities
- Change mgmt team/structure
- Resources and budget
- Sponsor role
- Sponsor activities
- Managers and supervisors
- Communications
- Training
- Resistance
- Reinforcement and feedback
- Consultants
- PM/CM integration
- Change readiness
- Justifying change management
- Enterprise Change Management
- Change saturation/Portfolio mgmt
- Change management trends

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From the 2009 benchmarking report:
Greatest contributors to success

1. Active and visible executive **sponsorship**
2. Frequent and open **communications**
3. Structured change management **approach**
4. Dedicated **resources** for change mgmt
5. Employee **participation**

Why do they matter? Because when we effectively manage the people side of change, we achieve project results.

1) Sponsorship

- 1) Sponsorship
- 2) Communications
- 3) Approach
- 4) Resources
- 5) Participation

- In the 2009 study, sponsorship was #1 on the list of contributors by a 4:1 margin
 - In 2007, sponsorship was #1
 - In 2005, sponsorship was #1
 - In 2003, sponsorship was #1
 - In 2000, sponsorship was #1
 - In 1998, sponsorship was #1



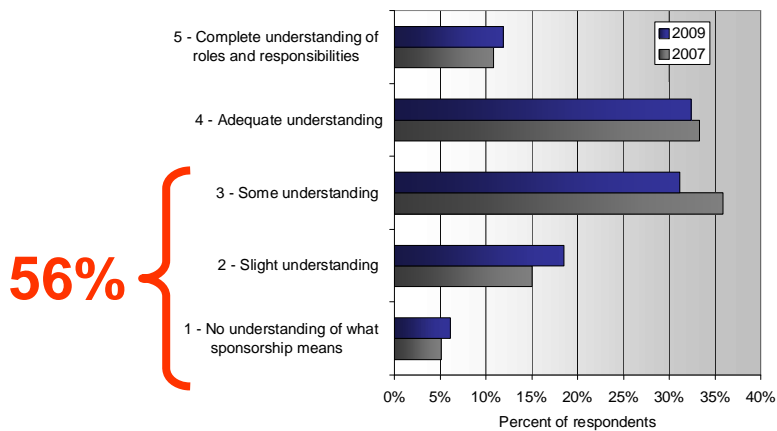
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What is the role of the sponsor?

- The research says:
 1. Active and visible participation throughout the project
 2. Build a coalition of sponsorship and manage resistance
 3. Communicate directly with employees

It is not just signing checks and charters!

Do sponsors understand their role?



From Prosci's 2009 benchmarking report

Sponsorship audit

1 = Strongly disagree
 2 = Disagree
 3 = Neutral
 4 = Agree
 5 = Strongly agree

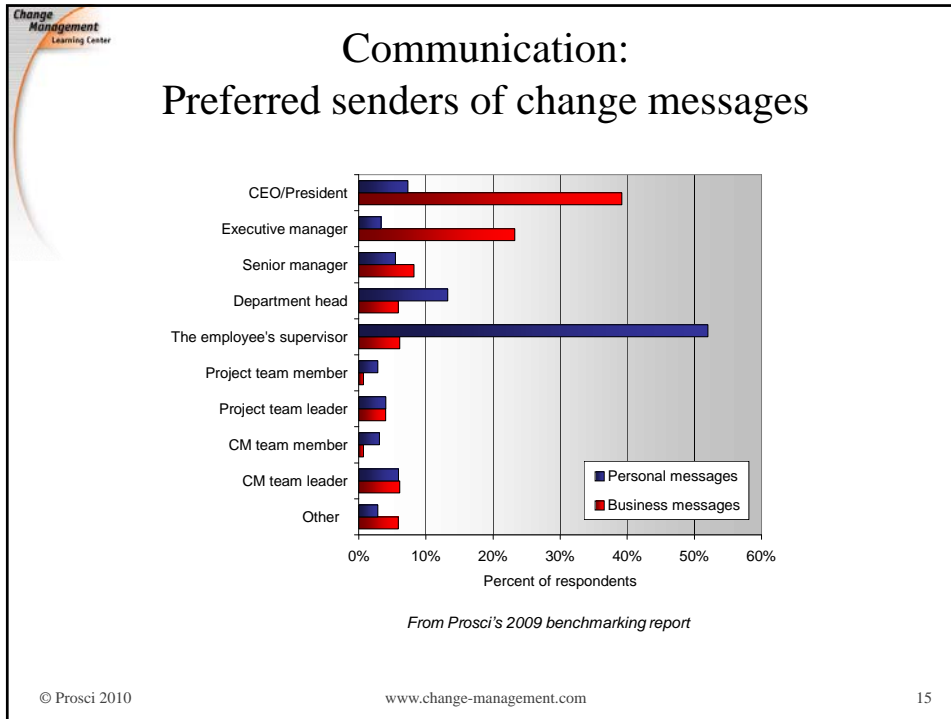
Active and visible executive sponsorship	Score
The project has an executive sponsor identified who is at the right level.	
The executive sponsor has a solid understanding of his or her role.	
The executive sponsor is ready, willing and able to participate actively and visibly throughout the entire project.	
The executive sponsor is ready, willing and able to build a coalition with key business leaders and managers.	
The executive sponsor is ready, willing and able to communicate directly with employees.	
Total:	

2) Communications

1) Sponsorship
 2) **Communications**
 3) Approach
 4) Resources
 5) Participation

- Most effective
 - ~~Email~~ *Face-to-face*
- Most important attributes
 - Shares what the change will mean to the employee
 - Explains the business reasons for why the change is happening
 - Is honest and clear

Not “project team” information like details about the solution, alternatives, timelines, schedules, etc.



- Change Management Learning Center
- ## What to do differently next time regarding communications?
1. Communicate **more often**
 2. Engage **managers and supervisors**
 3. Make the communication plan a **formal project deliverable**
 4. Start communicating **earlier**
 5. Use **more methods** and channels
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Communications audit

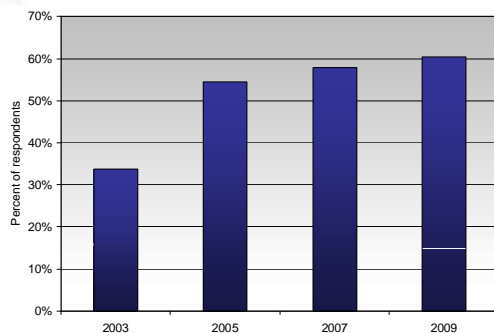
- 1 = Strongly disagree
- 2 = Disagree
- 3 = Neutral
- 4 = Agree
- 5 = Strongly agree

Frequent and open communications	Score
A communications plan is being created that identifies and segments impacted groups.	
The communications plan utilizes preferred senders of change messages.	
The need for change and the risks of not changing are central in the communications plan.	
Communications are being prepared that share how the change benefits the organization and end-users.	
Communications are scheduled to be frequent throughout the life of the project.	
Total:	

3) Approach

- 1) Sponsorship
- 2) Communications
- 3) **Approach**
- 4) Resources
- 5) Participation

- Did you use a structured approach to change management?



Participants reporting using a particular methodology
From Prosci's 2009 benchmarking report

Yes, we used a structured approach on our latest project

No, we did not use a structured approach on our latest project

Selection criteria for methodology

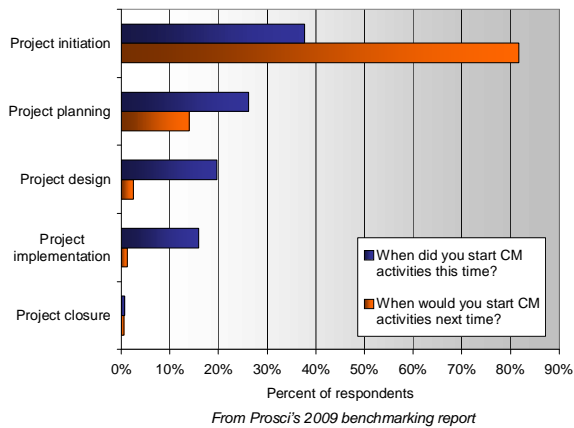
1. Easy to use
 - Easy to implement
 - Easy to understand
 - Easy to communicate to others
 - Simple
 - Practical
 - Structured and systematic
 - Logical
 - Comprehensive and holistic
2. Previous experience with a methodology
3. Proven to be effective
4. Matched the need
5. Flexibility and customization

When to start change management activities?

Participants favored starting change management during project **initiation** (82%) or **planning** (14%)

Those who were able to start early cited the following **factors**:

- Senior leadership involvement
- Acknowledgement by project manager
- Previous experiences
- Incorporation into project steps
- Resource availability and assignment
- Integrated into standard Project Management methodology



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Approach audit

1 = Strongly disagree
 2 = Disagree
 3 = Neutral
 4 = Agree
 5 = Strongly agree

Structured change management approach	Score
A holistic, structured change management approach has been selected and applied.	
A detailed change management strategy is being developed.	
A complete set of change management plans are being created.	
Change management activities are being integrated into the overall project plan from the very beginning.	
Total:	

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4) Resources

1) Sponsorship
 2) Communications
 3) Approach
 4) Resources
 5) Participation

- On average, participants cited that approximately 25% of total project FTE were dedicated to change management activities
- Over 50% still reported having too few change management resources

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Budget and FTE for change management

- As the “size” of the project increases, so do the required budget and FTE requirements
 - Size defined by:
 - Project investment
 - Number of employees impacted
 - Scope of impact (workgroup to enterprise)

Influencing and constraining factors

- Influencing factors:
 - Nature of the change
 - Scope of required change management efforts
 - Number of impacted groups
 - Organizational capacity
 - Benchmarking
 - Geographical distribution
 - Phase of project
 - Established organizational guidelines
 - Strategic importance of the project
 - Project team’s change management experience
- Constraining factors
 - Budget
 - Availability
 - Skill set
 - Organizational maturity in change management
 - Confidentiality

Sometimes:
*“you get what you get and
you don’t throw a fit”*

Resources audit

1 = Strongly disagree
 2 = Disagree
 3 = Neutral
 4 = Agree
 5 = Strongly agree

Dedicated resources for change management	Score
The project has an identified and dedicated resource focusing on change management.	
Change management resources are available throughout the entire project – from planning through implementation.	
Change management resources are adequately trained.	
Total:	

5) Participation

1) Sponsorship
 2) Communications
 3) Approach
 4) Resources
5) Participation

- Focus groups
- Input to the design of the change
- Proactive interactions
- Feedback

Changes only succeed when employees ultimately change how they do their jobs.

Participation audit

1 = Strongly disagree
 2 = Disagree
 3 = Neutral
 4 = Agree
 5 = Strongly agree

Employee participation	Score
Employees have been given input into the design of the solution.	
Systems are in place to proactively gather feedback.	
Metrics and measurements are created to evaluate employee adoption of the change.	
Total:	

Review – top 5 contributors

1) Sponsorship	Is it the right level? Do they understand their role? Are they ready, willing and able to fulfill role?
2) Communications	Are groups identified and segmented? Are the right people sending messages? Are the messages right?
3) Approach	Is there an approach selected? When will activities begin? Will they be integrated into project plan?
4) Resources	Are their resources? Are they trained and ready to fulfill their role?
5) Participation	Has input been gathered? Will feedback be gathered? Will adoption be measured?

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Why the top 5 are important?

Because:

- Great sponsorship
- +
- Effective communications
- +
- A structured approach
- +
- Dedicated resources
- +
- Employee participation

Successfully managing the people side of change – which results in projects meeting objectives, realizing benefits, delivering results and ultimately improving the performance of the organization.

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Score calculation

1) Sponsorship score	_____ (out of 25)
2) Communications score	_____ (out of 25)
3) Approach score	_____ (out of 20)
4) Resources score	_____ (out of 15)
5) Participation score	_____ (out of 15)
Total score:	_____ (out of 100)

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1) Sponsorship	5 6 7 8 9 10 11 12 13 14	15 16 17 18 19 20	21 22 23 24 25
2) Communications	5 6 7 8 9 10 11 12 13 14	15 16 17 18 19 20	21 22 23 24 25
3) Approach	4 5 6 7 8 9 10 11	12 13 14 15 16	17 18 19 20
4) Resources	3 4 5 6 7 8	9 10 11 12	13 14 15
5) Participation	3 4 5 6 7 8	9 10 11 12	13 14 15

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Score interpretation

Score	Interpretation
80 – 100	You are doing a good job of applying change management best practices on your project. According to data on change management effectiveness, projects with scores of 80 - 100 are more likely to meet their objectives and finish on schedule.
60 – 79	There is work to be done. While you are doing okay on some of the factors, the change management program overall is not performing at a level that would ensure project success.
Under 60	Immediate and significant work is required to get the project on track. Research shows that projects with ineffective change management face more resistance, experience more barriers, and surprise obstacles and are less likely to meet their objectives.

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Next steps: Prosci's complete 2009 edition of *Best Practices in Change Management*

- Study by the numbers
 - 6th longitudinal study
 - 575 participants
 - 65 countries
 - 112 pages
 - 25 sections
 - 65 figures
 - 11 tables
 - \$249 (qty discounts)



The most comprehensive and forward-looking body of knowledge available on change management

Full of tips, suggestions, best practices and lessons-learned you can apply immediately to the projects you support.

Prosci change management offerings Research-based | Holistic | Easy-to-use

Certification



3-day intensive program where you apply the methodology, process and tools to a real project as you learn them.

Earn CEUs, PDUs and HRCI credits

Open enrollment: offered at locations across the US, and also around the world by Primary Affiliates

At your location: for classes up to 15 participants

"Awesome - truly one of the most beneficial programs I have ever attended - immediate application on the job!"

"The best training class I have had in years. Goes way beyond the strategy and framework and focuses on real world problems and the tools to solve them."

Additional training

Onsite programs for: Executives and senior leaders; Managers and supervisors; Front-line employees

New: Train-the-Trainer program teaches you how to deliver Prosci's change management programs in your organization

Methodology tools



Change Management Toolkit: 3-ring binder with CD-ROM – complete process and set of assessments, worksheets and templates for creating change management strategy and plans



Change Management Pilot Pro: online methodology tool with "four-click" access to methodology, downloadable templates and assessments, benchmarking excerpts, presentations and numerous eLearning modules

Best Practices report



Best Practices in Change Management (2009 edition): most complete body of knowledge on change management available, with benchmarking results and lessons-learned from 575 change practitioners – learn what works and what doesn't work for managing the people side of change

Change management certification

"Very easily the best, most educational learning experience in which I have ever participated." - Chris T.

- **Prosci change management public sessions** (Tuition: \$2100)
 - 3-day certification program in change management
 - Work on an actual change project from your organization
 - Utilize best practices research with more than 2000 companies worldwide
 - Get input from seasoned executive instructors and fellow classmates
 - "Hit the ground running" with your change management plans when you return
 - Earn 2.4 CEUs, 24 PDUs from PMI and 19.75 HRCI recertification credits
 - www.change-management.com/change-management-training.htm
 - Offerings of the 3-day certification program:
 - Several times per month at locations across the United States, or at your location
 - Across the globe offerings by Primary Affiliates and Authorized Training Providers

"One of the best sessions for business training I have attended. Well structured methodology for immediate impact."
- Ken M.

"Fantastic program to bring together the project management discipline with a change management methodology."
- Keith S.

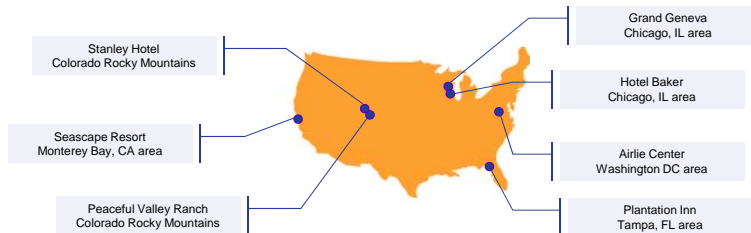
"Amazing experience - career changing for me. What I learned at Prosci's Change Management Program will allow me to transform my organization."
- Shelly Z.

"Many training sessions only give the theoretical approach, but this one took it to the next necessary step of implementation. This will jump-start the change!"
- Debra Q.

Change management certification

Course locations across the U.S.

Or bring the program to you – email training@prosci.com for information about onsite programs



"This program absolutely over-delivered my expectations. I now feel more prepared and better equipped to do my job."
- Paul S.

"Awesome - truly one of the most beneficial programs I have ever attended - immediate application on the job!"
- Robin S.

"This was the most effective and engaging course I've ever taken. I feel that I can truly use this knowledge in my personal and professional life immediately."
- Lisa S.

"The best training class I have had in years. Goes way beyond the strategy and framework and focuses on real world problems and the tools to solve them."
- Jennifer J.

Prosci Train-the-Trainer

- The goal of Prosci's Train-the-Trainer (TTT) program is to enable you to **facilitate an experience** that transforms how someone sees themselves when it comes to managing the people side of change.
 - www.change-management.com/ttt/index.htm

Courses you can teach following TTT:

- Prosci's 3-day program for change management practitioners and project team members
- Prosci's 1-day coaching program for managers and supervisors
- Prosci's 4 to 6-hour sponsor program for executives and senior leaders
- Prosci's 1-day primer for front-line employees

Topics covered in the 3.5 day TTT program:

- Philosophy and principles
- Success factors
- Preparing for a course
- The big picture
- Storytelling
- Transitions and activities
- Facilitator challenges
- Course facilitation

Prosci's TTT program is delivered at the Change Management Learning Center in Loveland, CO each month. See dates at the website above. Class size is limited to 5, so seats are limited.

"Companies around the world are building competency in change management to become more flexible in today's marketplace. Prosci's Train-the-Trainer program gives you the ability to provide these courses internally - and for a lower cost to your organization."

~ Jeff Hiatt President and CEO, Prosci Inc.

Resources for applying the Prosci methodology

- The following resources were used in the creation of this webinar. If you are looking for more detailed descriptions, checklists and tools, visit www.change-management.com/bookstore.htm for ordering information.
- Resources for developing change management plan
 - **Change Management Toolkit** (\$349)
 - Change management principles, process, templates and checklists in an easy-to-use 3-ring binder with CD-ROM
 - www.change-management.com/change-management-toolkit.htm
 - **Change Management Pilot Pro 2010** (\$449)
 - Online version of Prosci's methodology and tools
 - Updated content with latest best practices and new assessments
 - www.change-management.com/cm-pilot.htm

Reference and research materials

- Reference guides
 - **Best Practices in Change Management benchmarking report** (\$249)
 - 2009 benchmarking study, most comprehensive report ever
 - Lessons-learned and findings from 575 participants from 65 countries
 - www.change-management.com/best-practices-report.htm
 - **Change management: the people side of change** (\$18.95)
 - Introduction to and foundation in managing the people side of change
 - www.amazon.com and search for “change management”
 - **ADKAR: A model for change in business, government and our community** (\$18.95)
 - The definitive explanation of the ADKAR model and how it can be applied to create successful change
 - www.change-management.com/adkar-book.htm

Resources for supporting others

- Support for managers and supervisors
 - **Change Management Guide for Managers and Supervisors** (\$189)
 - 3-ring binder with detailed guidelines and exercises to help managers support their employees through the change process
 - www.change-management.com/managers-guide.htm
 - **Employee Survival Guide to Change** (\$14.95)
 - A handbook to help employees survive and thrive during change with frequently asked questions and tools for managing personal transition
 - www.change-management.com/survival-guide.htm
 - **Coaches training session** (onsite, call for pricing)
 - 1-day program full of exercises to apply coaching principles
- Executives and senior leaders
 - **Executive briefing** (onsite, call for pricing)
 - 4 to 6 hour session geared to show senior leaders how they can be successful sponsors of change, with assessments and application on real changes

Enterprise perspectives

- In addition to the tools for applying change management on a particular change effort, Prosci has offerings to support organizations who have taken the next step – toward managing the portfolio of change and building change management competencies throughout the organization
- **Change Portfolio Toolkit** (\$800)
 - A structured approach and set of tools for bringing clarity to the portfolio of change. Use Change Scorecards, the Group Impact Matrix, Change Heat Maps and the Portfolio Dashboard to better understand and manage the portfolio of change in the organization
 - www.change-management.com/portfolio-toolkit.htm
- **ECM Lab** (\$4000 + \$250 per participant for materials)
 - A facilitated design session that helps you and your team create a customized plan for rolling out change management in your organization.
 - Conducted over five “live” sessions with assignments for lab work in between by your ECM team.
 - www.change-management.com/ecmlab.htm

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