

# Prosci change management webinar

## Best Practices Roundtable

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### About Prosci:

#### Our principles:

- Research-based
- Holistic
- Easy-to-use

#### Prosci by the numbers:

6	✓	Longitudinal studies
12	✓	Years of research
66%	✓	Fortune 500 companies
2,000+	✓	Research participants
3000+	✓	Certified practitioners
38,000+	✓	Registered members

### About our webinars:

#### Webinar purpose:

- Educational
- Thought provoking
- Challenge the status quo
- Provide new ideas

*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 has a full suite of tools available to help organizations build their own internal competency at managing the people side of change.

#### Our channels:

- Published products and tools
- Web-based tools and applications
- Face-to-face training
- Online learning opportunities

#### Our target audiences:

- Change management specialists
- Project teams and leaders
- Senior leaders
- Managers and supervisors

#### Contact:

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<http://www.change-management.com>

Webinars are presented by Tim Creasey,  
Prosci Director of Research and Development

## Agenda

- What is a Best Practices Roundtable?
- Who should hold a Best Practices Roundtable?
- What does Prosci provide?
  - Outline of Discussion Guide
  - Overview of report
- How do you get started?



<b>Sixth</b>	Longitudinal study
<b>575</b>	Participants
<b>112</b>	Pages
<b>65</b>	Countries
<b>25</b>	Sections
<b>65</b>	Figures
<b>11</b>	Tables

## What is a Best Practices Roundtable?

- Small group discussions...
- Focused on best practices...
- To promote meaningful dialogue and better change management application
- Designed to be easy to conduct
- Chance for you to bring change management to the table



## Who should hold a Best Practices Roundtable?

<b>Internal groups dedicated to change:</b>	a Center of Excellence, Community of Practice, HR or OD consultants, project managers, communication or training specialists, Change Agent Network, etc
<b>Professional groups connected to change:</b>	Project Management Institute (PMI) local chapters, American Society for Training and Development (ASTD) chapters, Society for Human Resource Management (SHRM) chapters, etc.
<b>Industry groups:</b>	Both large and small, public and private organizations
<b>Project teams:</b>	Working on a particular project
<b>Alumni</b>	Groups in your organization that have been certified in Prosci's methodology

## What does Prosci provide?

- **Best Practices Roundtable: Discussion Guide**
  - This 19-page document includes the data and tools you need to hold a Best Practices Roundtable
- **Optional: facilitated Best Practices Roundtable by a Prosci analyst**

## Outline of Discussion Guide

- Excerpts from the 2009 edition of Best Practices in Change Management
  - Complete table of contents
  - Complete index of figures and tables
  - Executive overview
  - **Greatest contributors to success**
  - **Greatest change management obstacles**
  - **Change management trends**

## Outline of Discussion Guide

- Best Practices roundtable exercises
  - ➔ **Questions to consider**
  - ➔ **Top trends assessment**
  - ➔ **Project diagnosis**

## Questions to consider

- Questions for both contributors to success and obstacles
- Select several as a starting point for your roundtable

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**Roundtable tools – Questions to consider**  
<http://www.change-management.com/best-practices-report.htm>

**Greatest contributors to success**

1. Rate the level of active and visible sponsorship you typically see on projects.
2. What ways have you measured active voice and visible involvement from senior leaders?
3. Do your projects tend to over communicate or under communicate?
4. What attributes do the most successful communications share?
5. What percentage of projects in your organization utilize a structured approach to change management?
6. Why do some see change management while others do not?
7. How do projects assign change management resources (FTE and funding) to projects?
8. Can you influence or react to recurring decisions? How?
9. What creative approaches have you used to encourage employee engagement and participation?
10. What relationship do you see between change management and employee engagement?
11. Any observations from the trends you trace?

**Greatest change management obstacles**

12. Which of the three roles (accountability throughout project, sponsorship realties, and direct communication) do you find to be the most difficult?
13. What consequences of your sponsorship have you witnessed?
14. What factors have you used to influence sponsor behavior?
15. How much resistance from employees do you find is preventable?
16. What is the most effective technique you have used to manage resistance?
17. What challenges have you faced related to obtaining resources and funding?
18. How have you "made the case" for change management?
19. How much resistance from managers do you find is preventable?
20. What specific techniques have you utilized to engage managers and supervisors?
21. Have you ever been asked to apply "change management" to a change that wasn't there?
22. How do you better engage with project managers and team members?
23. What are the biggest communication threats you face on a project you support?
24. How do you utilize change management to drive more effective communications?
25. In what ways does your organization's culture impact the position to change?
26. What tactics are effective to addressing cultural change barriers?

**Top trends**

27. Which trends surprised you?
28. Which trends matched your experience?
29. Does the mix/type of responses you work in support your position on the trends?
30. Which trends are you directly influencing?

**New report sections**  
 Which of the new topics at the bottom right of page five were the most interesting to you?

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## Top trends assessment

- Assess your position on each of the top ten trends from the 2009 report
- Discuss overall scores and scores for particular questions

Best Practices in Change Management

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**Roundtable tools – Top trends assessment**  
<http://www.change-management.com/best-practices-report.htm>

Trend	Assessment	Score
1. A greater recognition of the need for change management – seen or critical to success and contributor to ROI	1. No recognition 2. Some recognition 3. Complete recognition	
2. Change management competency building – more knowledge and training opportunities at all levels	1. No competency building programs 2. Some competency building programs 3. Extensive competency building programs	
3. Dedication of resources for change management – assigned on projects and identified in organizations	1. Resources not assigned 2. Resources occasionally assigned 3. Resources dedicated for all projects	
4. Use of methodology and tools – structured approach to the people side of change	1. No use of methodology or tools 2. Occasional use of methodology or tools 3. Comprehensive use of methodology or tools	
5. Application on projects – sought out and brought rather than looking for projects to support	1. No projects applying change mgmt 2. Some projects applying change mgmt 3. All projects applying change mgmt	
6. Integration with project management – creating partnerships of the project and methodology levels	1. No integration occurring 2. Some integration 3. Full integration	
7. Change saturation – feeling the consequences on various levels of having too much change occurring	1. Not addressing saturation 2. Some attention paid to saturation 3. Actively working to manage saturation	
8. Standard change management approach – sends strong message and increases consistency and efficiency	1. No standard approach in the org 2. Movement toward a standard approach 3. Standard approach adopted and shared	
9. Establishment of a change management group – organizational structure to support change mgmt	1. No group established or progress made 2. Working toward creation of group 3. Change mgmt group established	
10. Management of the portfolio of change – tracking, managing and prioritizing competing initiatives	1. No work on managing the portfolio 2. Initial steps taken on portfolio mgmt 3. System in place for managing portfolio	
Total score (out of 30):		

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## Project diagnosis

- Draw insights from each contributor to success and obstacle
- How is your project performing on these dimensions?
- Particularly powerful for project team discussions within an organization

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### Roundtable tools – Project diagnosis

The following tables are effective for facilitating discussion with project teams working on a real initiative. Use what strengths, weaknesses and opportunities you can identify based on the findings from the 2009 edition of *Best Practices in Change Management*.  
<http://www.change-management.com/best-practices-report.html>

Project \_\_\_\_\_

Greatest contributor to success	Insights for your project
1. Active and visible executive sponsorship	
2. Frequent and open communications around the need for change	
3. Structured change management approach	
4. Dedicated resources and funding for change management	
5. Employee engagement and participation	

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## Overview of report

- Report by the numbers:
  - 6th longitudinal study
  - 575 participants
  - 65 countries
  - 112 pages
  - 25 sections
  - 65 figures
  - 11 tables
- Geographic distribution
  - 44% from US
  - Increases from Australia and Canada
- Industry
  - Top 5: Consulting, Finance/Banking, State or Local Government, Development and Manufacturing, Health Care
- Role of participant
  - Change Management team leader, External consultant, Project team leader
- About the projects
  - Most impacted process, system, org and job role (46%)
  - 70% in implementation phase or completed
  - Entire enterprise was most common scope of change(44%)
  - Fairly evenly distributed based on project investment and number of employees impacted



## How do you get started?

1. Decide on your audience
2. Schedule your roundtable
3. Distribute the *Best Practices Roundtable: Discussion Guide* to the attendees with some instruction on the exercise(s) you will be leading
4. Hold your roundtable
5. Let Prosci know how it went!

End webinar

## Resources for moving forward

### Best Practices in Change Management

Research findings from study with 575 organizations on how to manage the people side of change – includes what worked, what didn't and what to do differently next time.  
<http://www.change-management.com/best-practices-report.htm>

### 3-day certification program

Highly interactive program where you apply the methodology and tools to a project you are currently supporting as you learn them, with the support of a senior executive instructor.  
[www.change-management.com/training.htm](http://www.change-management.com/training.htm)

### Change Management Pilot 2008

Online application with "four-click" access to entire methodology, downloadable templates and assessments, presentations and eLearning modules including best practices excerpts.  
[www.change-management.com/cm-pilot.htm](http://www.change-management.com/cm-pilot.htm)

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## 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 22.75 HRCI recertification credits
    - [www.change-management.com/change-management-training.htm](http://www.change-management.com/change-management-training.htm)
  - Held several times per month at locations across the United States

"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.

## 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](http://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](http://www.change-management.com/change-management-toolkit.htm)
  - **Change Management Pilot 2008** (\$449) and **Pilot Professional** (\$559)
    - Online version of Prosci's methodology and tools
    - Updated content and new presentations
    - [www.change-management.com/cm-pilot.htm](http://www.change-management.com/cm-pilot.htm)

## Portfolio and CM Competency resources

- 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** (\$3200/\$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](http://www.change-management.com/portfolio-toolkit.htm)
- **ECM Lab** (\$20,000/\$4000)
  - 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 the team.
    - [www.change-management.com/ecmlab.htm](http://www.change-management.com/ecmlab.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](http://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](http://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](http://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](http://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](http://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, including assessments on real changes

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