

## Connecting change management to business results The Project-Purpose-Particulars-People exercise

The following tutorial<sup>1</sup> presents Prosci's new **Project-Purpose-Particulars-People** exercise for helping an audience see the connection between change management and achieving business and project results. The intended audiences for this type of exercise include project leaders, project teams, senior managers and change sponsors. Prosci is interested in how this approach works for you – please provide your feedback especially if you use or plan to use the approach with a group. Contact a Prosci analyst at [changemanagement@prosci.com](mailto:changemanagement@prosci.com) or 970-203-9332.

### Introduction

In making the case for change management, there are numerous approaches. Many of these approaches have been detailed in previous tutorials from the Change Management Learning Center, including:

1. The qualitative impacts of effectively and ineffectively managing change in the *Why change management* tutorial<sup>2</sup>
2. Prosci's ROI of change management model describing the three human factors that define or constrain the value a project returns<sup>3</sup>
3. Showing the correlation between change management and project objective data, including new correlation analysis from the 2007 benchmarking report<sup>4</sup>

While these previous approaches can be effective by themselves, the most important thing you can do is **help your audience make the connection themselves**. The simple **Project-Purpose-Particulars-People** exercise outlined below may seem like common sense, but the impact for the audience can be significant. Walking an individual or group through the process helps create the “ah ha” moment that cannot be achieved by simply telling someone about the importance of change management.

#### Connecting change management to business results exercise:

A simple exercise to help your audience make the connection between change management and business results by identifying:

- Project name
- Purpose
- Particulars
- People

Please remember to visit the tutorial webpage and [leave us your feedback](#) on the exercise. Do you plan to use the Project-Purpose-Particulars-People exercise? Did you use it already with a group? How did it go ?

<sup>1</sup> Read this tutorial, *Connecting change management to business results*, online:  
<http://www.change-management.com/tutorial-connecting-cm-business-results.htm>

<sup>2</sup> Read the *Why change management* tutorial:  
<http://www.change-management.com/tutorial-2007prep-why-CM.htm>

<sup>3</sup> Read the *ROI of change management* tutorial:  
<http://www.change-management.com/tutorial-2007prep-roi-CM-mod1.htm>

<sup>4</sup> Read the *2007 correlation data* tutorial:  
<http://www.change-management.com/tutorial-07correlation.htm>

### Step 1 – Create four columns

The exercise is a simple build. Start by creating four columns. If you are facilitating this as group discussion, you may use a white board or flip chart. You can also have each person create their own columns on a sheet of paper in front of them.

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### Step 2 – Identify the Project

Begin by having your audience label the first column **Project Name**. Have your audience pick a project they are familiar with and that is important to them and write the name in the first column. What is the project we are thinking about? Examples include: Global ERP, Supply Chain Optimization, ACME 2015, eBenefits 2.5, Create PMO, etc.

<u>Project Name</u>			
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### Step 3 – Identify the Purpose

Next, label column two **Purpose**. Here, have your audience write down the specific goals or outcomes the project is trying to achieve. Why are we doing this project in the first place? What is the benefit to the organization? Examples include: Reduce cost, increase revenue, improve margin, introduce new product, reallocate inventory, streamline business processes, merge parts of the organization, implement unified data source for entire organization, implement common business practices.

<u>Project Name</u>	<u>Purpose</u>		
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### Step 4 – Identify the Particulars

The third column is labeled **Particulars**. In this column, write down exactly what will be changing in the organization – the nuts and bolts of the change. Document the specific impacts to business processes, systems, tools, job roles or organizational structures. Really work to describe what will be different in the future than it is today.

<u>Project Name</u>	<u>Purpose</u>	<u>Particulars</u>	

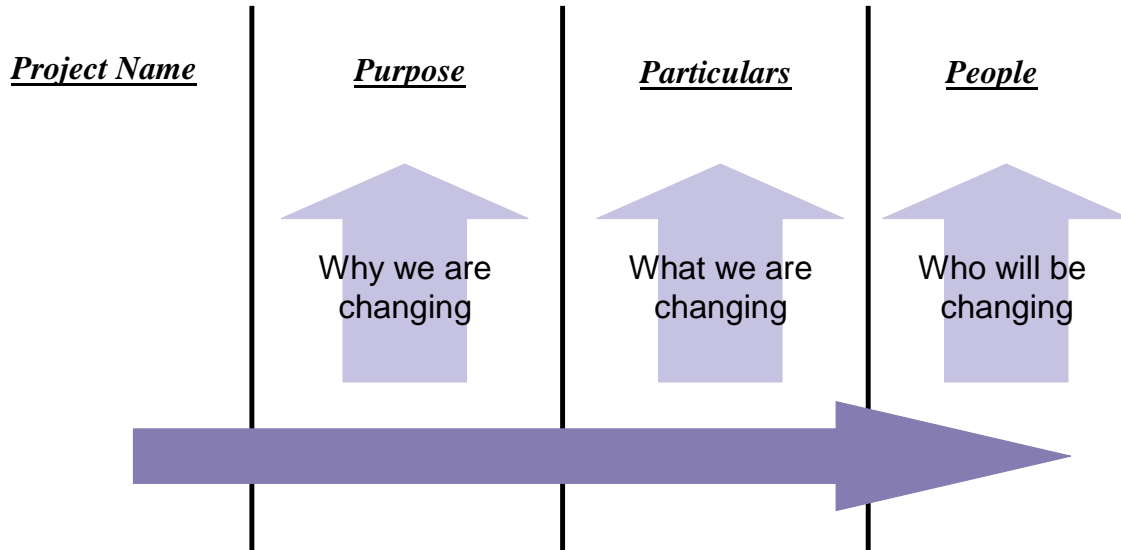
### Step 5 – Identify the People

Have your audience label the final column **People**. Here, identify who in the organization will have to change how they work. Whose day-to-day activities will be impacted by this project? Who will be doing things differently after the project is implemented? And, the answer “everyone” is not good enough – you need to be specific!

<u>Project Name</u>	<u>Purpose</u>	<u>Particulars</u>	<u>People</u>

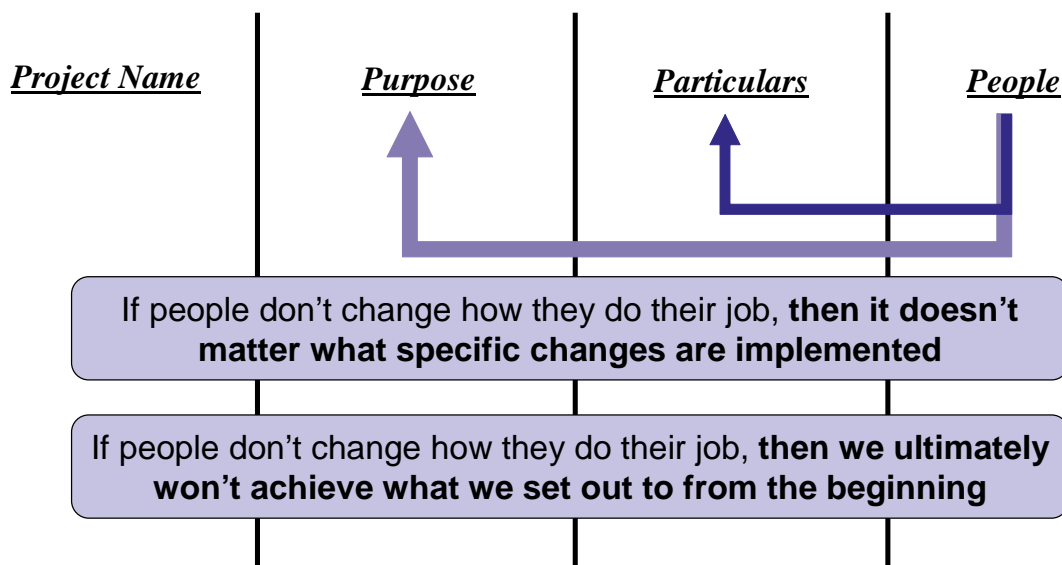
### Step 6 – Creating the context

The four columns in the **Project-Purpose-Particulars-People** exercise, and more importantly the process of labeling and filling in each column, helps create a context for the project. It ties the project to why it is happening, to what specifically will be changing, and most importantly to who will be impacted by the change.



### Step 7 – Making the connection

The connection between the columns is the key. If we do not manage the people side of change on the far right, it really doesn't matter what specific changes are architected (in the Particulars column) because they won't be realized. And if people don't change how they do their jobs, we ultimately won't achieve the benefits we were looking for from the project (in the Purpose column). Return on investment will not be realized. The project will not deliver results.



So what can we do about the far right column – the people who have to do their jobs differently? The answer is **change management**. Effectively managing change requires an understanding of how individuals go through change – described by the ADKAR model – and an understanding of the tools that project teams have to support these individual transitions. Prosci’s organizational change management methodology has three phases – preparing for, managing and reinforcing change – and utilizes five levers to achieve ADKAR with impacted employees – communication, sponsorship, coaching, training and resistance management.

Effective change management requires:

Individual change management	Organizational change management
Understanding how one person makes a change successfully	Understanding what tools we have to help individuals make changes successfully
<p>ADKAR:</p> <ul style="list-style-type: none"> <li>• Awareness</li> <li>• Desire</li> <li>• Knowledge</li> <li>• Ability</li> <li>• Reinforcement</li> </ul> <p>ADKAR describes the “what are we trying to achieve” when we undertake any change management activities - from newsletters to kick-off meetings to training sessions. Each organizational change management intervention is tied to one of the building blocks of successful change described in the ADKAR model.</p>	<p>3-phase process:</p> <ul style="list-style-type: none"> <li>• Preparing for change</li> <li>• Managing change</li> <li>• Reinforcing change</li> </ul> <p>5 levers:</p> <ul style="list-style-type: none"> <li>• Communication plan</li> <li>• Sponsor roadmap</li> <li>• Coaching plan</li> <li>• Training plan</li> <li>• Resistance management plan</li> </ul>
<p>Prosci’s change management certification program teaches you how to apply both <b>individual change management</b> and <b>organizational change management</b> to your projects. In the 3-day certification program, you apply the tools, templates and process to a project that you are currently working on. You leave with a 15 minute executive presentation and the beginnings of your change management plans. You can also earn 2.4 CEUs, 24 PDUs from the Project Management Institute (PMI) and 24 recertification hours from the Human Resources Certification Institute (HRCI). Download the <a href="#">training brochure</a> to find out more about this exciting program.</p>	

## Conclusions

The goal of Prosci's **Project-Purpose-Particulars-People** exercise is not to teach the audience anything, but to get them nodding their heads. The exercise creates the “ah ha” moment about change management because the audience makes the connection themselves - between the project, its purpose and the people who must change how they do their jobs. We can stand on our desk and shout about the importance of change management, but this simple exercise can have far more impact since the audience makes the connection themselves.

### Reflections:

- **The build seems common sense, but will open some eyes.** As you read the tutorial and think about the exercise, you may reflect that it is overly simple and common sense. However, forcing a group to think hard about what goes in to each column will create some important “ah ha” moments when the connections appear on a single piece of paper.
- **How easy was it to complete each column?** Entering the **Project** was simple, even if it was a long and complex acronym. Adding the **Purpose** was probably simple too, as these goals and objectives are part of the conversations that often take part on a daily basis with senior leaders and project teams. Documenting the **Particulars** becomes a little more difficult. Finally, completing the **People** column is very difficult - some in the group may not even be able to identify who is going to be impacted. This is the nature of the build, but also an important learning point and commentary on what we think about and spend our time on when we work on a major project in the organization. The fact that the particulars don't matter and the purpose won't be achieved if people don't change how they do their jobs is the key.

Once you have your audience saying, “yes, we must do something about the people impacted by this change,” you are ready to move forward. The next step is to apply a structured approach to managing that change - with both an individual change management approach (ADKAR) and an organizational change management approach (Preparing for Change, Managing Change and Reinforcing Change). Prosci's 3-day certification program is the best way to learn and build your change management strategies. Find out more at the [training page](#) or by downloading the [training brochure](#) (PDF).

### Connecting change management to business results exercise feedback:

**Comment on this tutorial:** We would like your feedback on this tutorial and the **Project-Purpose-Particulars-People** exercise presented. Please [go to the tutorial online](#) and complete the form to share your thoughts. Also, if you do use this exercise we want to hear how it went and how it was received. You can also call 970-203-9332 to speak with an analyst about the exercise and how to use it.

We want to know:

- Have you used the Project-Purpose-Particulars-People approach or do you plan to use it?
- Describe how you did/will use the exercise? Who was in the audience? What was the setting?
- Comments on the exercise:
- Questions about how to use the exercise:

[Share your feedback online](#)