

Prosci change management webinar

Integrating change management and project management

The slides, PDF file of the slides, the one page checklist and the contained content are designed for use with participation in the webinar. **Reproduction and distribution without permission are prohibited.** If you are interested in distributing this information in your organization, please contact Adrienne Boyd at adrienne.boyd@prosci.com or 970-203-9332.

About Prosci:

Our principles:

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

Prosci by the numbers:

6	✓	Longitudinal studies
12	✓	Years of research
66%	58%	Fortune 500 companies
2,000+	1,600	Research participants
3000+	2,500+	Certified practitioners
38,000+	32,000+	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:

Telephone Support – 970-203-9332
Email Support – webinar@prosci.com
<http://www.change-management.com>

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

Prosci Global Conference

Best Practices in Change Management
Las Vegas, Nevada - April 25 - 28, 2010



Trends, Tools & Methodologies

Join us for the biggest change management event of the year!

www.acmp.info/conference

conference@prosci.com



Located at the new M Resort –
just 10 minutes from the airport.

Sponsors:

Booz | Allen | Hamilton
delivering results that endure

RICOH



Co-hosted by the
Association of Change
Management Professionals

Featured speakers:



Chris Worley
Univ. of Southern California



Todd Jick
Columbia University



Linda Ackerman Anderson
"The Change Leader's Roadmap"



Darlene Meister
U.S. House of Representatives



Beverly Magda
Georgetown University



Jeanie Duck
"The Change Monster"



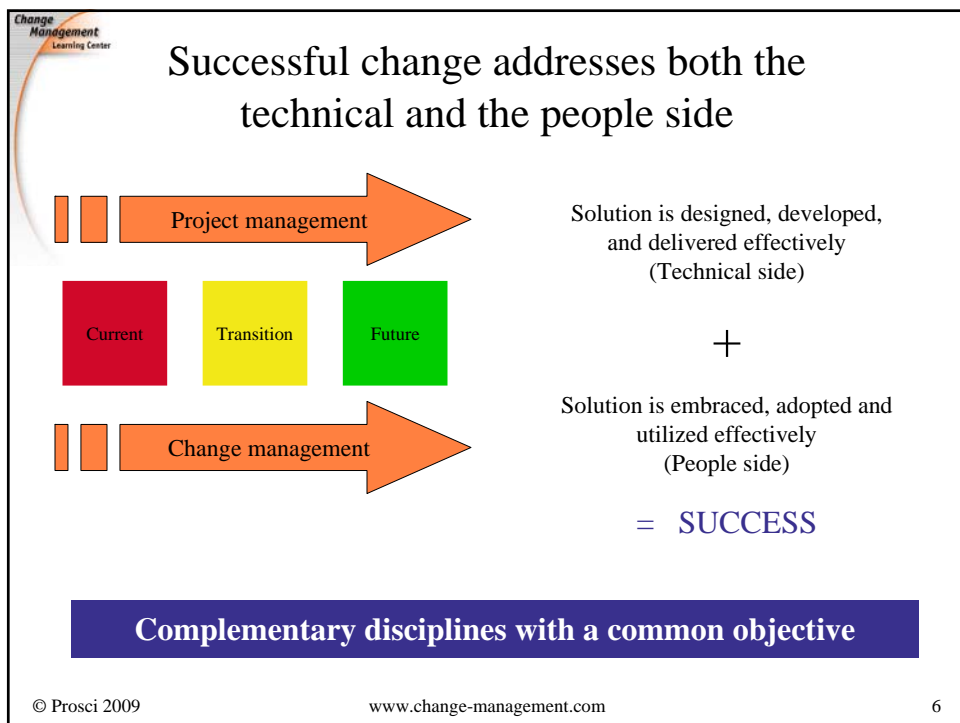
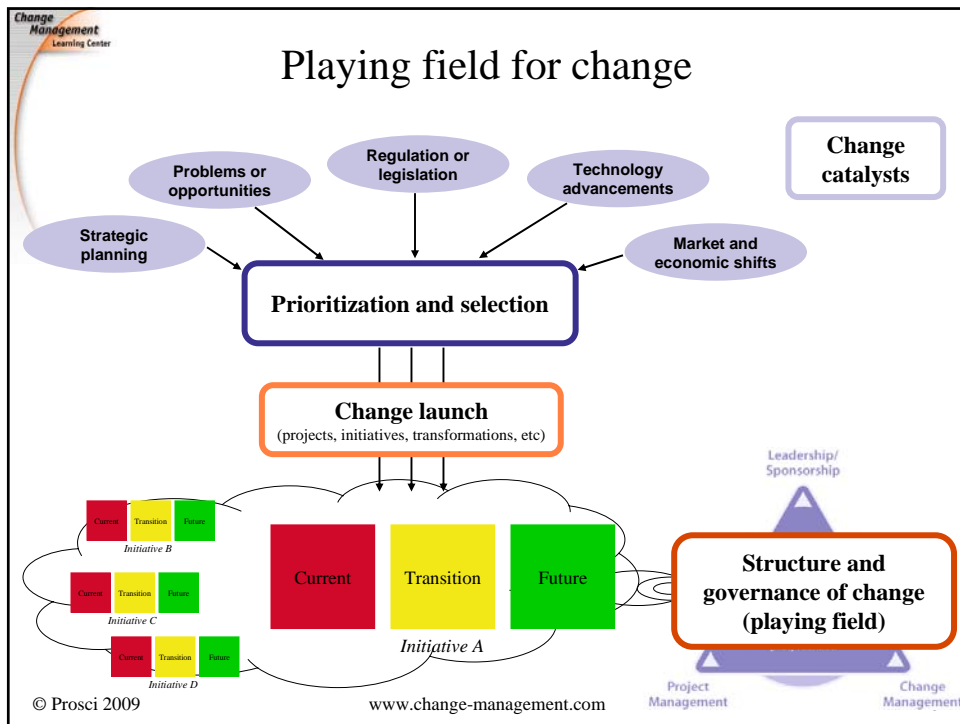
Dwight King
Ahliland Inc.

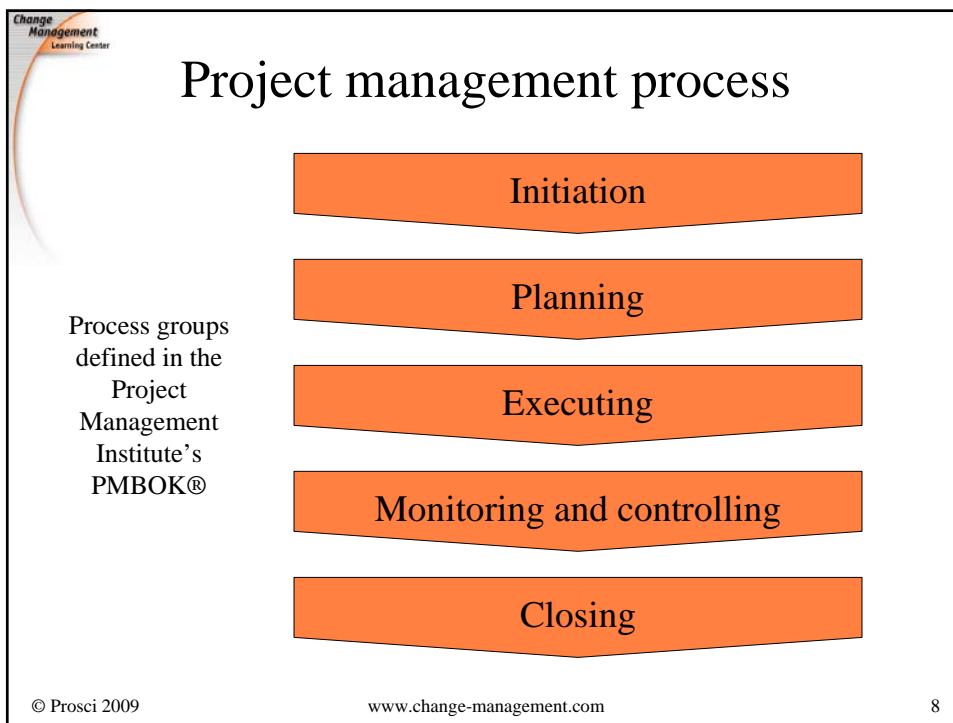
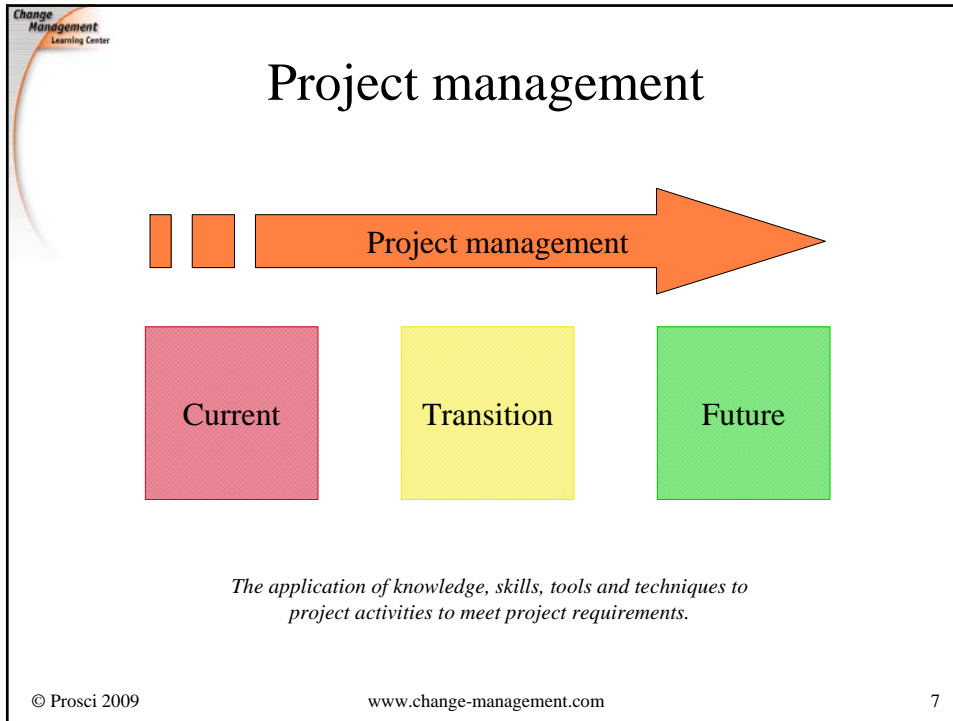
Change Management Learning Center

Agenda

- Foundation
 - Project management
 - Change management
- Integrating the disciplines
 - Resources: Who does the work
 - Tasks: Sequencing the work
- A warning on integration
- Latest benchmarking findings

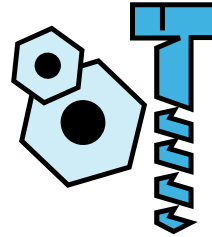






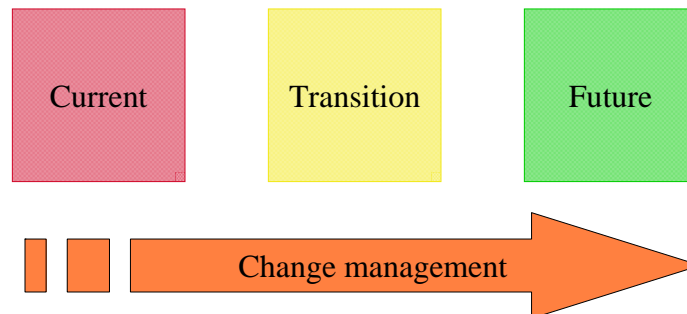
Project management tools

- Statement of work
- Project charter
- Business case
- Work breakdown structure
- Budget estimations
- Resource allocation
- Schedule/tracking



Change management

The process, tools and techniques to manage the people-side of change to achieve the required business outcome.



Change Management Learning Center

Change management process

Phase 1 - Preparing for change

- Define your change management strategy
- Prepare your change management team
- Develop your sponsorship model

↓

Phase 2 - Managing change

- Finalize change management plans
- Take action and implement plans

↓

Phase 3 - Reinforcing change


- Collect and analyze feedback
- Diagnose gaps and manage resistance
- Implement corrective actions and celebrate successes

Organizational

Preparing
Managing
Reinforcing

Individual

Awareness
Desire
Knowledge
Ability
Reinforcement




© Prosci 2009 www.change-management.com 11

Change Management Learning Center

Change management tools

- Individual change model
- Readiness assessment
- Communication plans
- Sponsorship roadmaps
- Coaching plans
- Training plans
- Resistance management
- Reinforcement



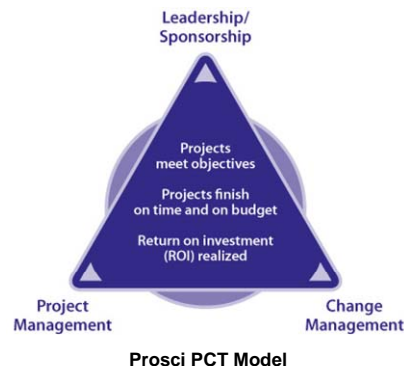
© Prosci 2009 www.change-management.com 12

Comparing change management and project management

What they have in common	What differentiates them
<ul style="list-style-type: none"> • They both follow processes • They both have a tool set • Each should be scaled to meet the specific needs of the project or initiative they are being applied to • The ultimate goal of both PM and CM is to deliver value to the organization by creating change • Neither prescribe the actual change • Successful projects have both 	<ul style="list-style-type: none"> • PM focuses on the technical side; CM focuses on the people side • Project management has been around much longer and is more broadly accepted • No one is ever asked to “justify” applying and funding project management • It takes different skills and competencies to be effective

PCT Model as a framework Prosci’s Project Change Triangle

- PM and CM are two of the corners required for success
- In the absence of either, the project is at risk
- Framework and assessment helpful in showing people how all the elements fit together

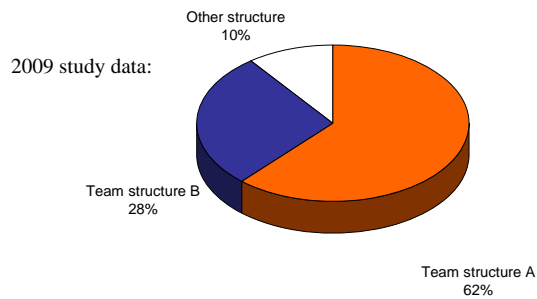


Integration: two perspectives

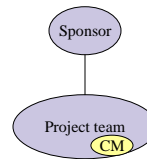
- Resource perspective
 - Who does the work?
How do they interact?
- Task perspective
 - Sequencing the activities taking place in PM and in CM

Integration: resource perspective

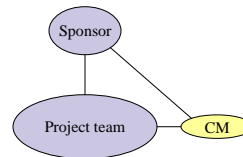
- Who will be doing the change management activities for the project?



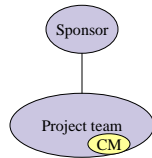
Team structure A



Team structure B



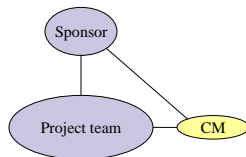
Source option 1: Someone on the project team



Could be a project team member or even the project manager

- Pros:
 - Intimately involved in the project background and discussion
 - Direct report to and accountability within the project
- Cons:
 - Lacks experience or expertise in change management
 - Limited learning opportunities
 - Priority not place on change management, focus can erode

Source option 2: External CM support group

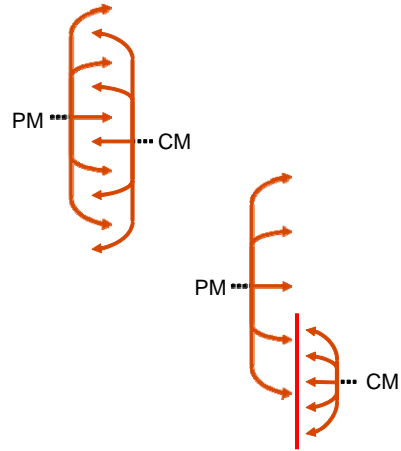


Could be internal team of specialists (such as a CMO – Change Management Office) or external consultants

- Pros:
 - Greater level of experience and expertise in change management
 - Likely trained and certified practitioners
 - Ability to draw on multiple experiences and lessons learned from across projects
- Cons:
 - May be seen as an outsider
 - No direct accountability for change management with project team
 - Change management can become “that group’s job”

Integration: task perspective

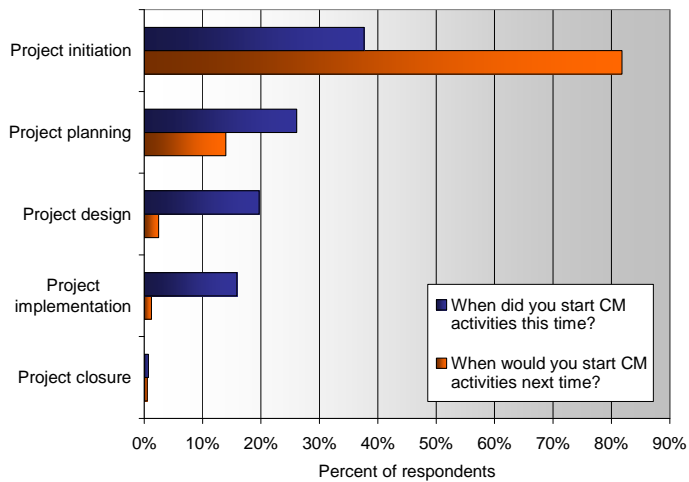
- When do the disciplines come together?
 - Or, when is CM brought to the table?
- How is the work integrated?



Benchmarking results: When to begin CM activities?



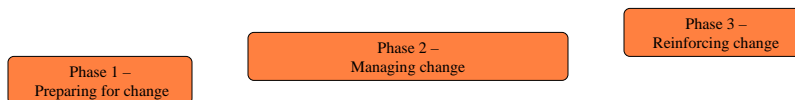
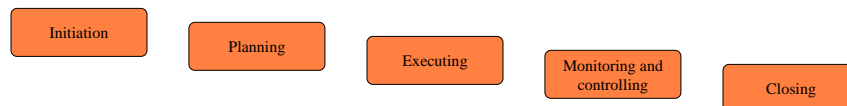
* From the 2009 Best Practices in Change Management benchmarking study



When change management begins...

- At the initiation of the project lifecycle:
 - Can be more proactive
 - Can mitigate resistance before negative consequences
 - Can influence timing and sequence of work
 - Can influence solution design decisions
- Well into the deployment of the project:
 - Results in tremendous catch-up for the team
 - Mainly fighting fires
 - Overly reactive
 - Leads to rework
 - Must account for all the previous activity and communication

Sequencing activities



Case study of integrated steps

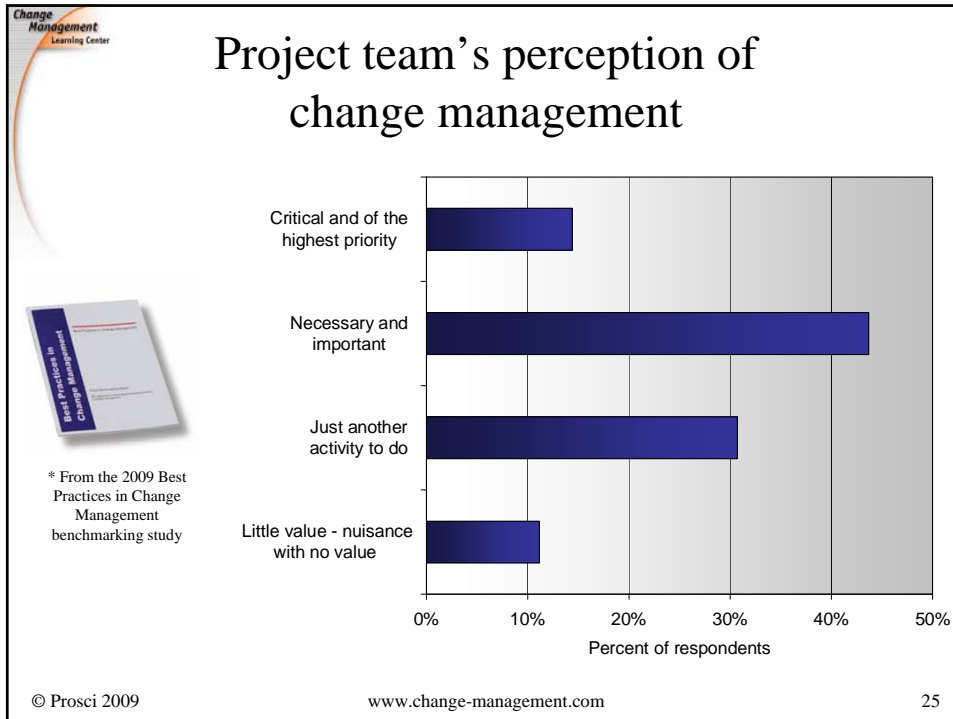
- This shows part of the integrated start-up phase
 - “Project” activities are not highlighted
 - CM activities are highlighted in yellow

Start-up phase

- 1.1. Define project objectives and scope with project sponsor
- 1.2. Determine high-level timeline and key milestones
- 1.3. Assess the size and nature of the change - CM
- 1.4. Assess the organization affected by the change and conduct employee readiness assessments - CM
- 1.5. Develop a change management strategy - CM
- 1.6. Prepare initial project budget
- 1.7. Select project team
- 1.8. Acquire change management resources - CM
- 1.9. Assess team competencies in change management - CM
- 1.10. Select outside consultants if required
- 1.11. Conduct team building and train project team
- 1.12. Train the change management team - CM
- 1.13. Identify senior stakeholders and members of project steering committee
- 1.14. Identify necessary project sponsors - CM
- 1.15. Assess sponsor positions and competencies - CM

A warning: do not eliminate customization by integrating the methodologies

- Any time we hardwire the methodologies, we run the risk of developing “vanilla” plans
 - Customization stops
 - Change management becomes just another box to check



- Change Management Learning Center**
- ## Steps to engage project team in change management
1. Working collaboratively with the project team
 2. Making a compelling case for why change management is necessary
 3. Providing training and education
 4. Making change management “real” to project teams
 5. Integrating change management activities into the project plan
 6. Leveraging sponsor involvement
 7. Communicating
 8. Documenting of roles and responsibilities
-
- * From the 2009 Best Practices in Change Management benchmarking study
- © Prosci 2009 www.change-management.com 26

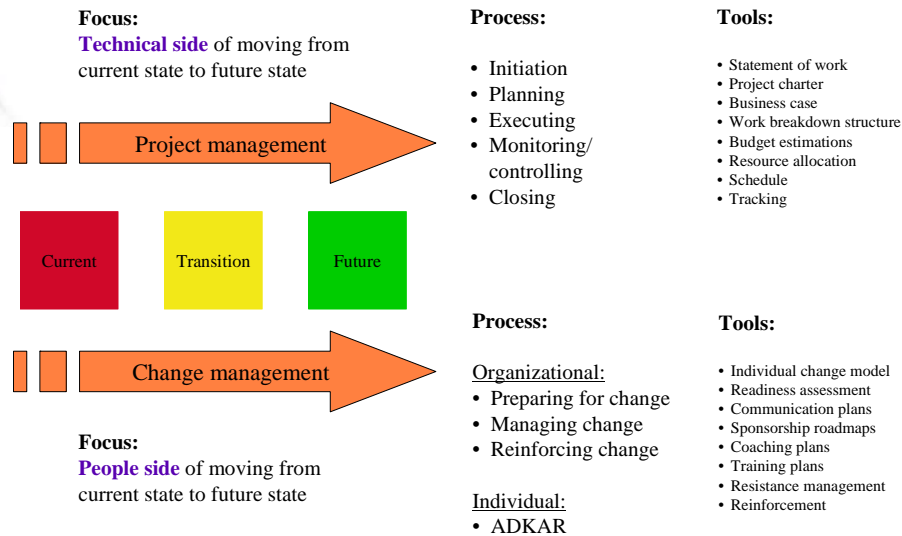
Top “do differently” regarding integrating project mgmt and change mgmt

1. Begin change management earlier
2. Provide training on change management
3. Ensure adequate resources for change management
4. Engage senior leaders
5. Engage with project members



* From the 2009 Best Practices in Change Management benchmarking study

Conclusion: CM and PM



Next steps Integration scorecard:

How well are you integrating change management and project management today on your projects today?	No integration	Superb integration
To what degree do you have a process in place to facilitate integration going forward?	No process	Process in place
How healthy are your independent CM and PM competencies/processes? - Change management - Project management	CM: Non-existent PM: Non-existent	CM: Highly developed PM: Highly developed

Resources for moving forward

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

Change Management Toolkit

Hardcopy toolkit of the Prosci change management methodology complete with assessments and templates you can use immediately (3-ring binder plus CD-ROM).
www.change-management.com/change-management-toolkit.htm

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>

* Tools or downloads referenced in this free webinar are for webinar educational purposes; reproduction or distribution of these tools requires additional permission – please contact Prosci for more information.

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
 - 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 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 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

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
- **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

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, including assessments on real changes

The slides, PDF file of the slides, the one page checklist and the contained content are designed for use with participation in the webinar. **Reproduction and distribution without permission are prohibited.** If you are interested in distributing this information in your organization, please contact Adrienne Boyd at adrienne.boyd@prosci.com or 970-203-9332.