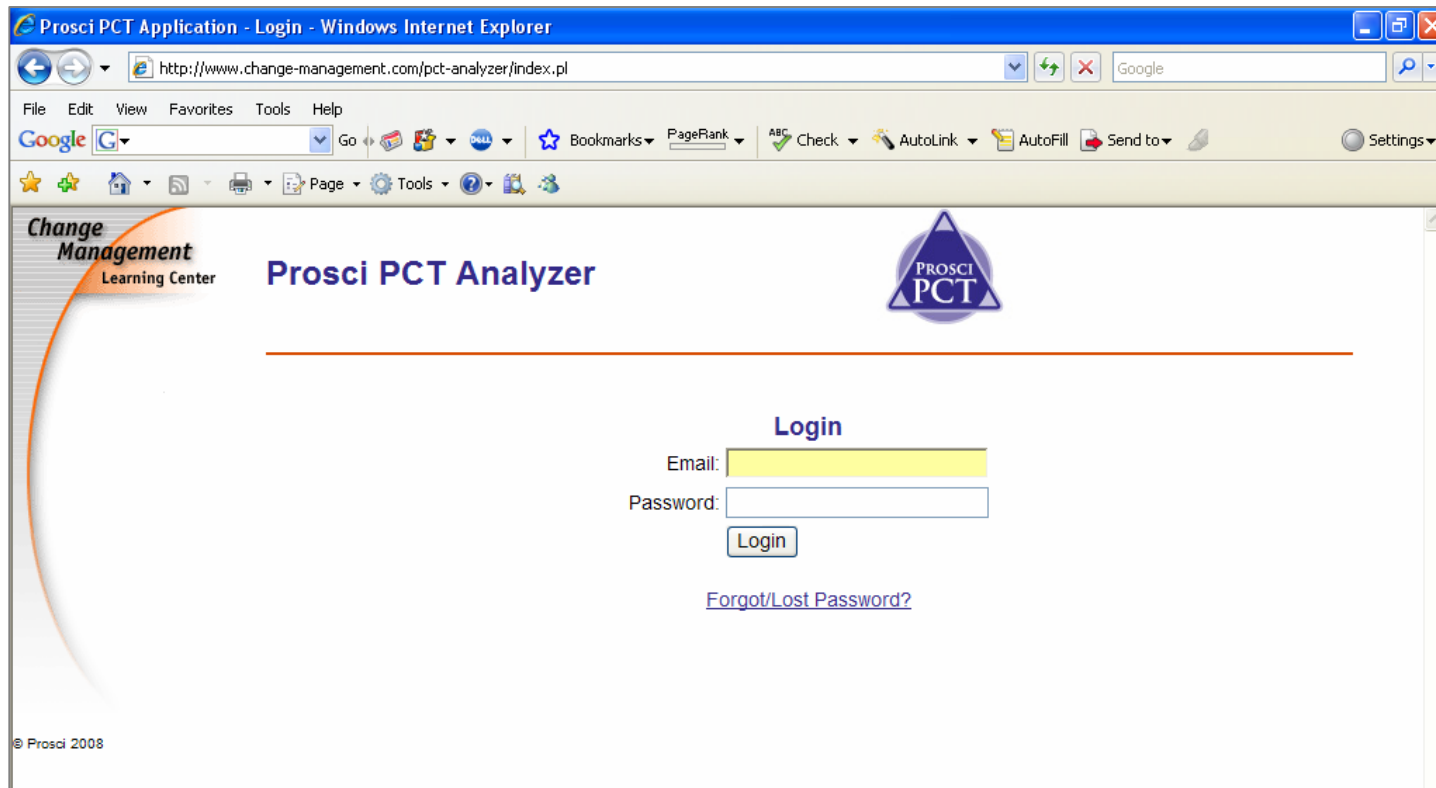


Prosci PCT Analyzer

User Manual

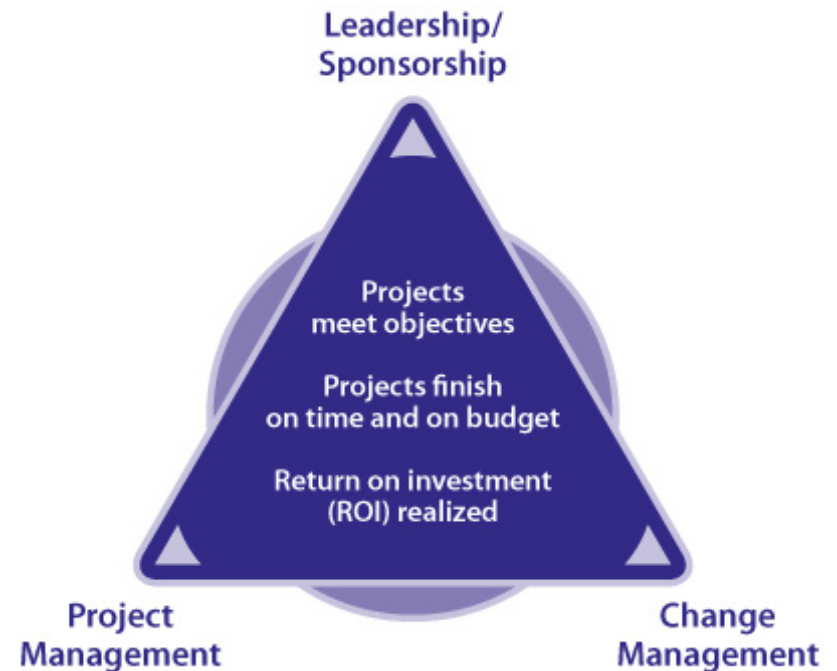


Visit www.change-management.com/pct-analyzer.htm for additional info or to place an order

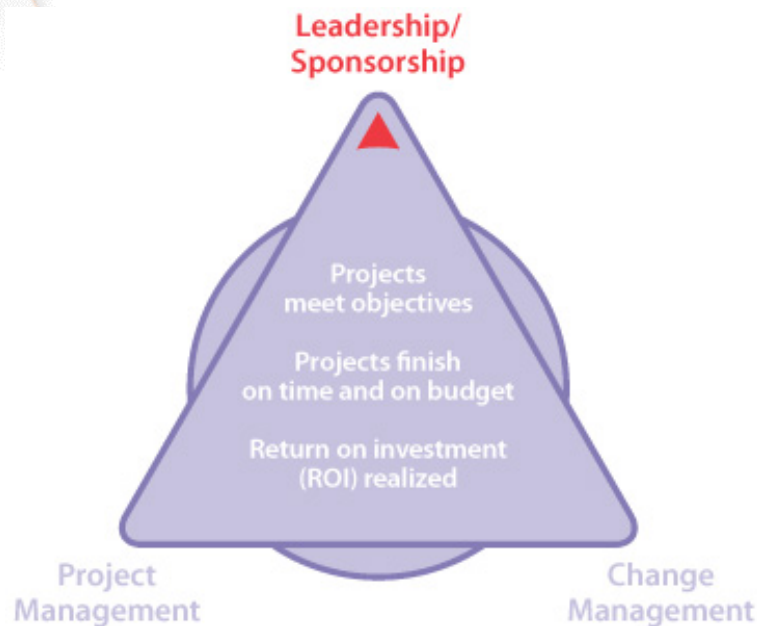
Email changemanagement@prosci.com or call 970-203-9332

Prosci PCT Analyzer foundation

- Prosci Project Change Triangle (PCT)
- Simple but powerful framework of what is required for projects to be successful
- Based on client interactions and research

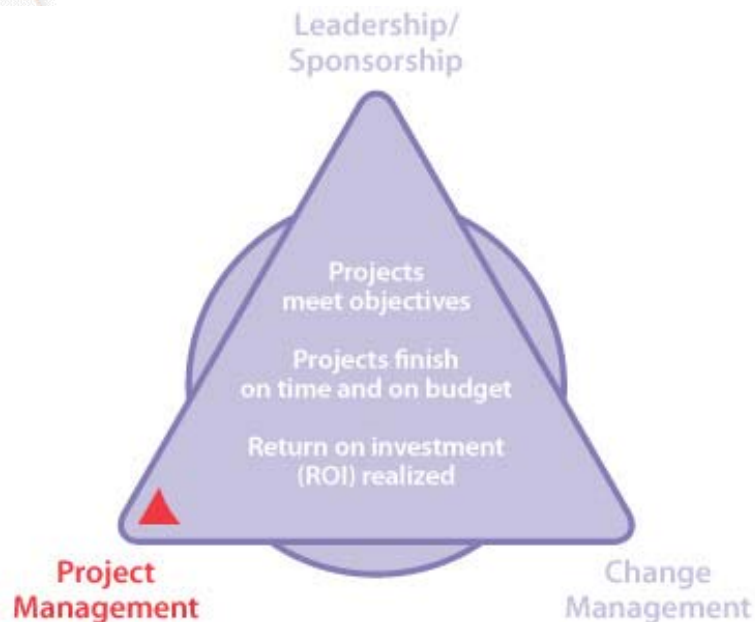


Leadership/Sponsorship



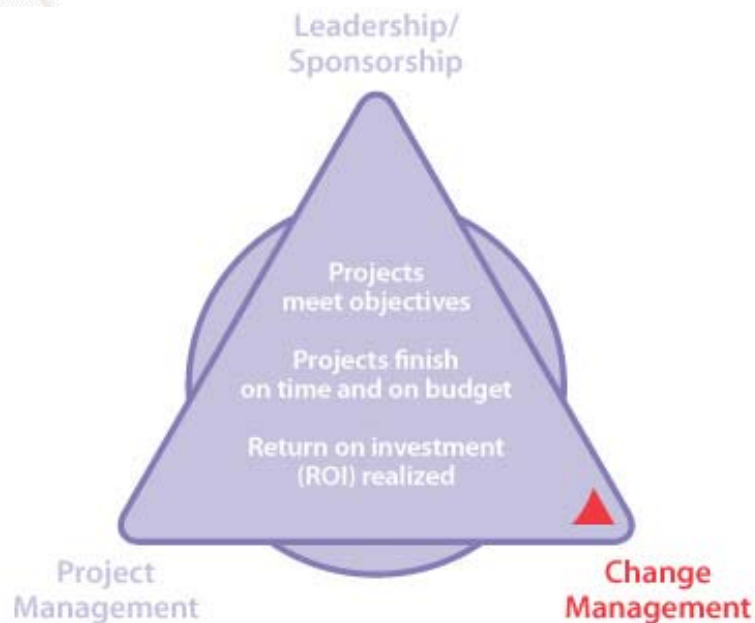
- Leadership and sponsorship is the responsibility of executives and senior managers in the organization who authorize, fund and charter the top-down organizational changes that end up as projects or initiatives.
- They are primarily responsible for making **decisions**, providing **direction**, and demonstrating their own and the organization's **commitment** to the particular change - whether it is a new product, an ERP system, a reorganization, or any number of organizational changes.
- The role of 'sponsor of change' is not one that can be selected or assigned; it is **tied to** and **dictated by** the actual change that is being implemented.
- From an **organizational perspective**, leadership is key in establishing the strategy and direction. Effective changes are clearly aligned with the vision and strategy of the organization.
- From a **project perspective**, leadership must support both the project management side (the technical activities to manage the development of a solution) and the change management side (the specific activities to help manage the people side of change) of a project or initiative.
- Leaders play key roles in **supporting** both the other disciplines represented by the connections in the **Prosci Project Change Triangle (PCT)**.

Project Management



- Project management is the set of processes and tools applied to business problems or opportunities to **develop** and **implement** a solution.
- One of the key components is having a change **defined** – you must know what is changing (processes, systems, job roles, organizational structure, etc.) in order to manage that change effectively.
- Project management involves understanding the tradeoff between the **time**, **cost**, and **scope** of change that can be achieved.
- Finally, project management is the application of the discipline called 'project management' that is a structured approach for managing tasks, resources, and budget in order to achieve a **defined deliverable**. Successful changes apply project management tools and processes to their initiatives.

Change Management



- Change management is the set of processes, tools and practices that are used to manage the **people side** of a change. Change management is the bridge between “implementing a solution” and an organization ultimately realizing the benefits associated with the change.
- Change management requires two perspectives – an **individual** perspective (how people experience change) and an **organizational** perspective (how groups can be managed through a change).
- Change management is the process of helping employees transition from the **current state** to the **future state** (as defined by the change) in a way that minimizes productivity loss, negative customer impact and employee turnover, while at the same time maximizes the speed of adoption and ultimate utilization of the change throughout the organization.
- Tools like communication, sponsorship and coaching are used to help employees make their own individual transition.
- Business results are only achieved when employees are **involved** and **participating** in the change. Change management is the final element of realizing change effectively.

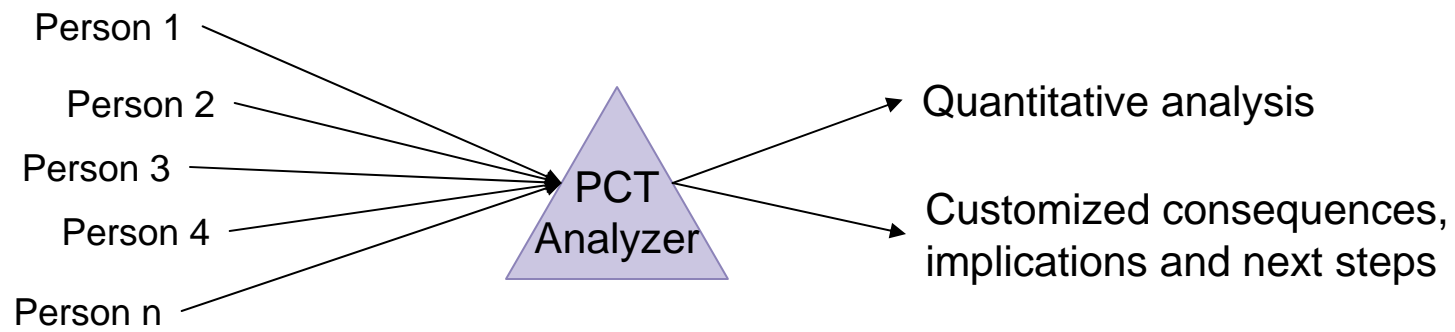
Prosci PCT Analyzer foundation

- Prosci PCT Model developed in 2007
 - Shows three components of a successful project
 - Leadership/Sponsorship
 - Project Management
 - Change Management
 - Shows interconnections
 - Simple assessment used to determine project health and potential weak points

The full PCT Assessment questions are included in the appendix of this user manual

Taking the next step with the PCT Analyzer

- PCT data collection
 - Moving past one person's observation to data collection from a project team or group
- Analysis of results
 - Data side: what do the numbers look like for the entire group?
 - Knowledge base: based on profile and specific question scores, what needs to be done next?



PCT Analyzer Output: Profile level

Profile data

Group averages for Leadership / Sponsorship, Project Management and Change Management corners – evaluation of Strength areas, Alert areas and Jeopardy areas

	Avg	Max	Min
L/S	21.7	28	17
PM	22.7	24	21
CM	11.3	12	10

Data points: 3



Profile analysis

Based on whether Leadership / Sponsorship, Project Management and Change Management are Strengths, Alerts or Weaknesses – a specific discussion of consequences based on the actual profile and score breakdown



Profile analysis: In this profile change management is absent or very weak, and leadership and project management are not robust. While this profile is not uncommon among change initiatives, projects of this type often struggle with employee resistance...

Action steps: ...

PCT Analyzer Output: Question level

Question level data

Averages from the group's data for all 30 of the PCT assessment questions and distributions of 1s, 2s and 3s for each question – call out of questions with averages of under 2 as areas for concern

Leadership / Sponsorship	Avg	1s	2s	3s
The change has an executive sponsor	2.3	0	2	1
Question 2	2.7	0	1	2
Question 3	1.7	1	2	0
Question 4	2.0	1	1	1
Question 5	1.3	2	1	0

Question level analysis

There are specific implications for a low score on each particular question – this section looks at any score that is less than 2 and provides a high-level discussion, consequences of a low score and action steps for improving the project performance

Question 3: The executive sponsor is willing and able to build a sponsorship coalition for the change, and is able to manage resistance from other managers and supervisors.

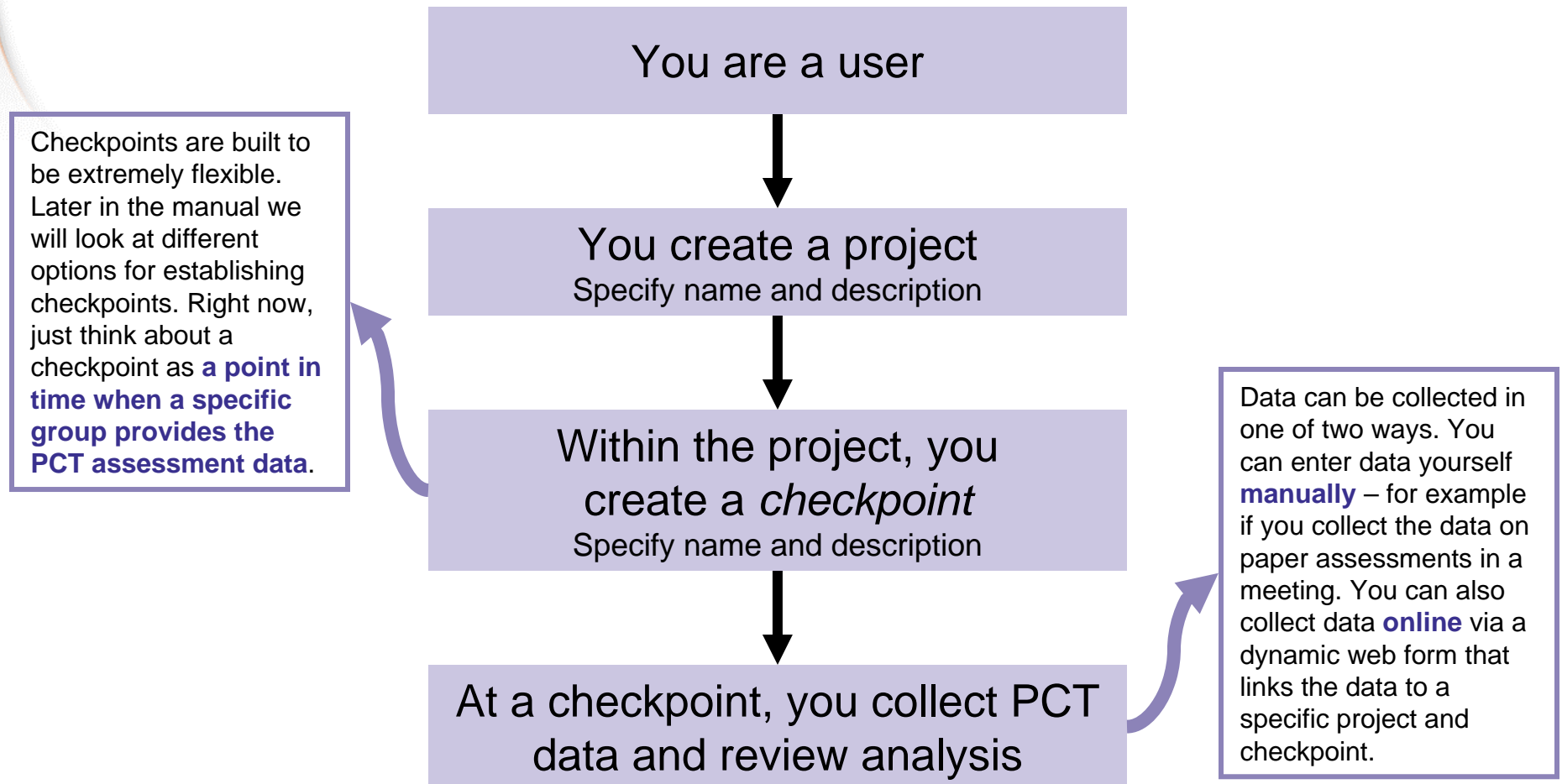
Discussion: Sponsorship is not just the action of one person. Sponsorship is the collective action of all senior leaders or managers whose areas or departments...

Consequences of a low score: If you scored low in this area, you will likely experience pockets of resistance throughout the organization. The weaker the coalition of business leaders...

Action steps: Provide your primary sponsor with a sponsor assessment diagram... Coach them on the methods and tools for building sponsorship among...

Score:
1.7

PCT Analyzer data structure



The following pages show a build of how the tool is architected and how you can begin analysis on your projects

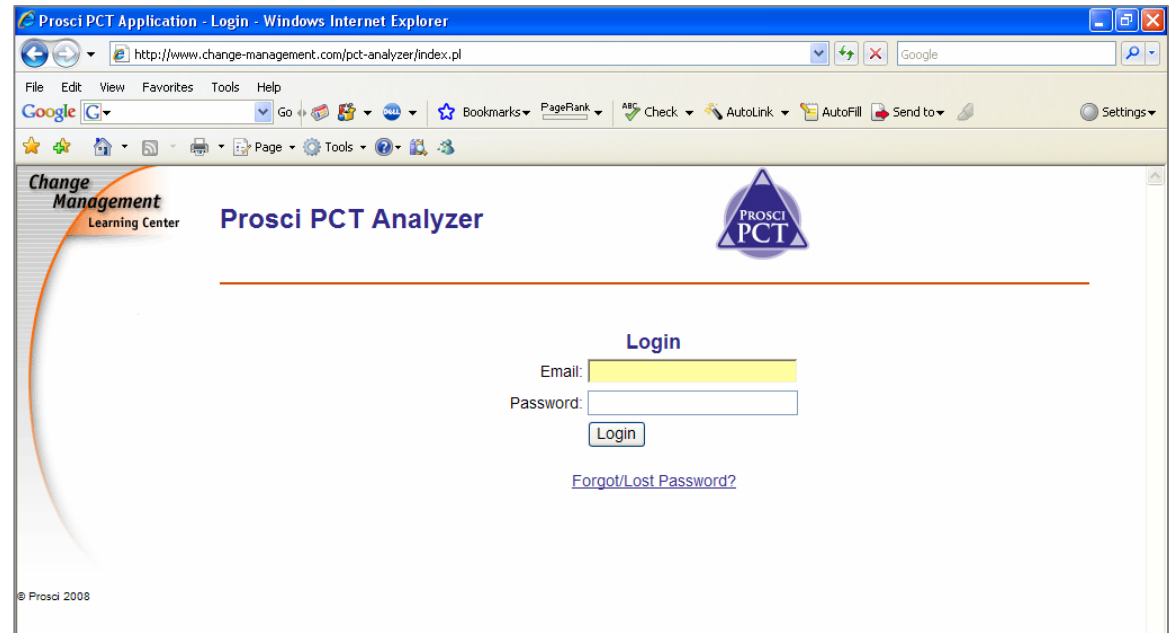
Login page

When you are added to the PCT Analyzer you will receive a welcome email with the url of the tool.

Welcome email details:

From: changemanagement@prosci.com
Subject: Prosci PCT Analyzer Access

The welcome email includes a temporary password you will use to access the tool for the first time. You will specify your own password when you establish your account.



PCT Analyzer website: www.change-management.com/pct-analyzer/

Profile data

When you log in the first time, you will come to the Your Profile page. Complete the fields and specify the password you will use to access the tool.

Once you have created your profile on your first login, you will be able to access this information using the [Edit Your Profile](#) link in the header of any page.

Required fields

- First Name
- Last Name
- Email
- Password

Prosci PCT Application - Registration Information - Windows Internet Explorer

http://www.change-management.com/pct-analyzer/index.pl?action=registration

Change Management Learning Center

Prosci PCT Analyzer

Your Profile

Please complete the following form. All required fields are marked in **bold**.

First Name:

Last Name:

Email:

Phone:

Company:

Department:

Title:

New Password
Please provide a new password for your PCT Analyzer account.

Password:

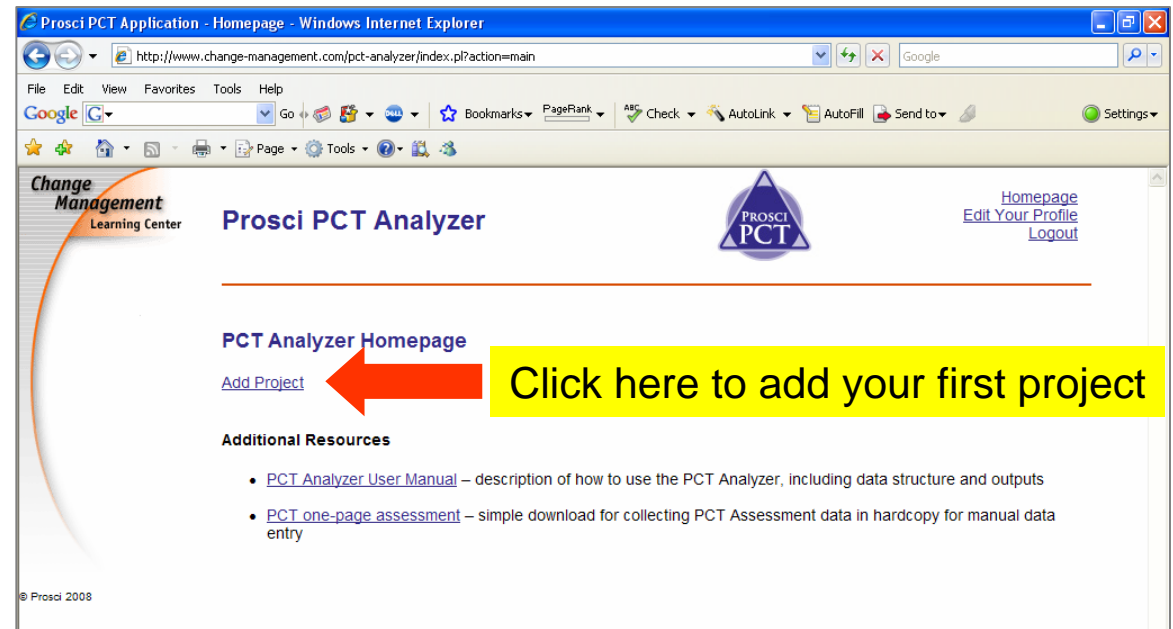
Password: (re-enter)

PCT Analyzer Homepage

The **PCT Analyzer Homepage** is where you will be directed each time you login. On your first login, you will not have any projects to analyze.

To add a project, simply click the [Add Project](#) link.

Once you begin using the tool, the list of projects you are analyzing will be found on the PCT Analyzer Homepage.



Additional resources:

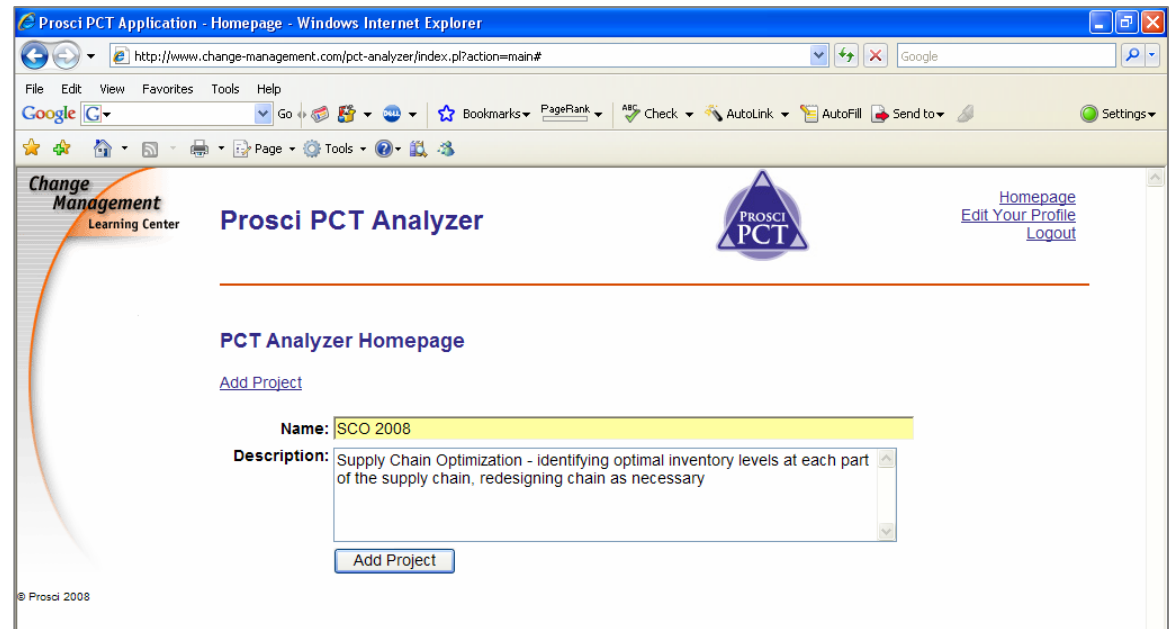
At the bottom of the PCT Analyzer Homepage you will see two additional resources. The first is a link to this user manual so you can always easily access the manual. The second is a PDF download of the PCT assessment you can use for collecting data in paper format when you use the manual data entry approach.

Add a project

Whenever you click the [Add Project](#) link on the PCT Analyzer Homepage, the webpage will expand and lets you specify the Name and Description of a new project. Once you have entered this information, click the Add Project button.

* These fields will be displayed when you collect assessment data from others who are working on the project, so be sure to specify a name and description that people will relate to, and that contains only information you are willing to share with data providers.

For this example, the project “SCO 2008” was entered, along with a short description of the supply chain optimization project.



The screenshot shows a web browser window titled "Prosci PCT Application - Homepage - Windows Internet Explorer". The address bar shows the URL "http://www.change-management.com/pct-analyzer/index.pl?action=main#". The browser interface includes a menu bar (File, Edit, View, Favorites, Tools, Help) and a toolbar with various icons. The main content area displays the "Prosci PCT Analyzer" logo and navigation links for "Homepage", "Edit Your Profile", and "Logout". Below the logo, the heading "PCT Analyzer Homepage" is followed by an "Add Project" link. The form contains two input fields: "Name" with the value "SCO 2008" and "Description" with the text "Supply Chain Optimization - Identifying optimal inventory levels at each part of the supply chain, redesigning chain as necessary". An "Add Project" button is located at the bottom of the form. A copyright notice "© Prosci 2008" is visible in the bottom left corner of the page.

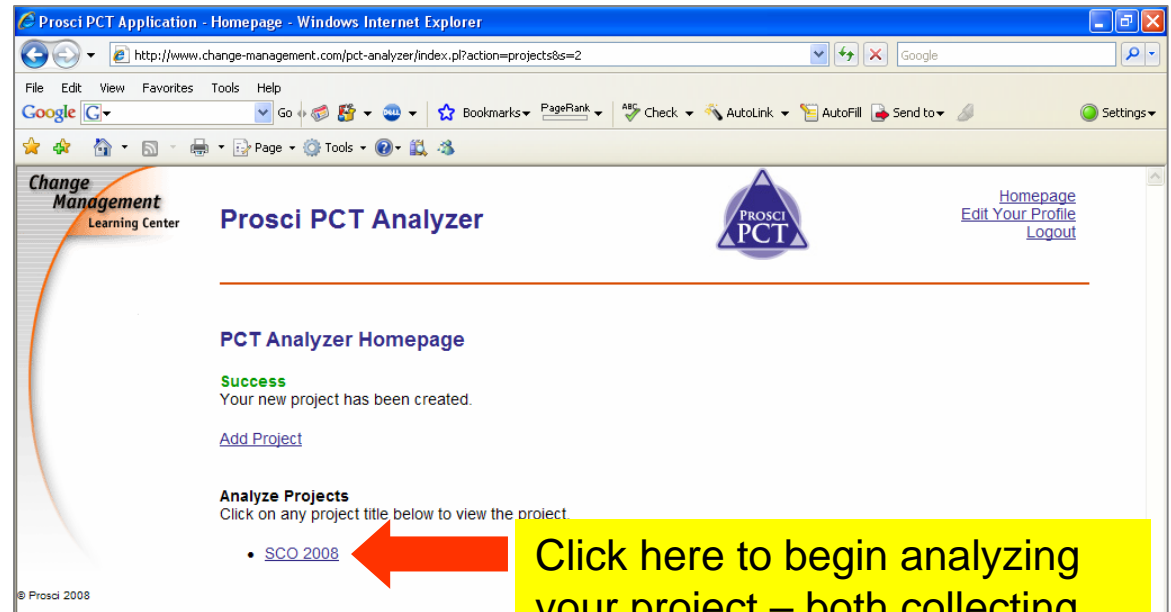
Depending on your purchase choice, you may have a limit to the projects you can analyze. If you've reached your limit, you will be prompted on how to increase the project capacity for your account.

Click to view a project

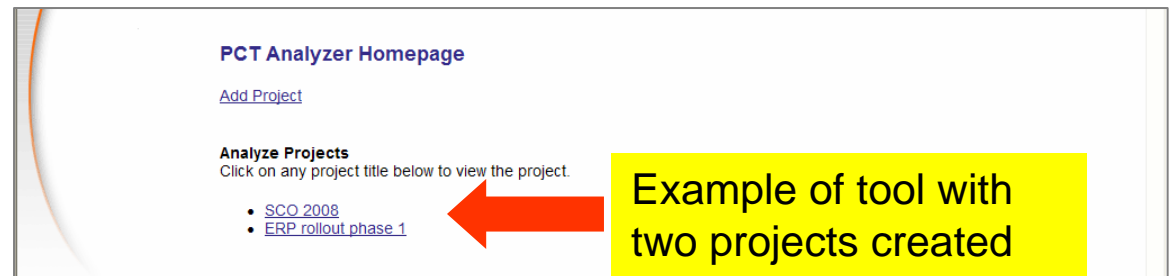
When you have successfully added a project, you will be redirected back to the PCT Analyzer Homepage and prompted that your project was created successfully.

Under the Analyze Projects heading, you will see a complete list of your projects.

To begin analyzing a project, simply click the project name you would like to review from the bulleted list.



Click here to begin analyzing your project – both collecting and reviewing data



Example of tool with two projects created

Project Dashboard

When you click on one of your projects, you will be brought to the **Project Dashboard**. The Project Dashboard shows the project name and description. You can click the Edit Project link above these fields to change the name and description.

It is from this page that you will create the Checkpoints that will house the data you are collecting.

Click Add Checkpoint to set a marker for data collection. Remember, a checkpoint is nothing more than *a point in time when a specific group provides the PCT assessment data*.

Prosci PCT Application - Project Dashboard - Windows Internet Explorer

http://www.change-management.com/pct-analyzer/index.pl?action=view_project&id=31

Change Management Learning Center

Prosci PCT Analyzer

Homepage
Edit Your Profile
Logout

Project Dashboard

[Edit Project](#)

Name: SCO 2008

Description: Supply Chain Optimization - identifying optimal inventory levels at each part of the supply chain, redesigning chain as necessary

[Add Checkpoint](#)

© Prosci 2008

Click here to create the checkpoints for the project

Remember that all PCT data in the PCT Analyzer is connected to a Project and a Checkpoint. You must establish a Checkpoint before you can enter or collect data

Add a checkpoint

When you click [Add Checkpoint](#) from the Project Dashboard, the page expands to let you provide a Name and Description for the specific Checkpoint.

* When you collect data, the assessment provider will be shown the checkpoint name as well as the project name and description, so be deliberate in what you enter in the fields.

There are no standards for how you specify your checkpoints. The tool was intentionally designed to allow incredible flexibility to how you, the user, bucket the data you collect. More information on checkpoints is provided at the end of the user manual in the tips and advice section.

The screenshot shows a web browser window titled "Prosci PCT Application - Project Dashboard - Windows Internet Explorer". The address bar shows the URL "http://www.change-management.com/pct-analyzer/index.pl?action=view_project&id=31#". The page content includes the "Change Management Learning Center" logo, the "Prosci PCT Analyzer" title, and a "Project Dashboard" section. Under "Project Dashboard", there is an "Edit Project" link, the project name "SCO 2008", and a description: "Supply Chain Optimization - identifying optimal inventory levels at each part of the supply chain, redesigning chain as necessary". Below this is an "Add Checkpoint" link. The form for adding a checkpoint has a "Name" field with the value "Project Launch" and a "Description" field with the value "4/1/2008 - Project charter and funding approved, project launch initiated". There is an "Add Checkpoint" button at the bottom of the form.

Two possible slices are **timing** and **groups** being surveyed.

Example A:

- Checkpoint 1: Project Launch
- Checkpoint 2: Funding gate
- Checkpoint 3: Pre-implementation
- Checkpoint 4: Go-live
- Checkpoint 5: 3 month follow up

Example B:

- Checkpoint 1: Business Unit A
- Checkpoint 2: Business Unit B
- Checkpoint 3: Business Unit C
- Checkpoint 4: Project team

Project Dashboard with checkpoint

After you create a Checkpoint for the project, you are ready to collect and analyze data.

The Checkpoints for your particular project are listed on the Project Dashboard. The table shows summary data for the number of data points and the average scores for Leadership / Sponsorship, Project Management and Change Management. When there are no data points in a checkpoint, the averages will show N/A.

* Once there is data entered for the checkpoint, the Review link on the far right will be activated.

Prosci PCT Analyzer

[Homepage](#)
[Edit Your Profile](#)
[Logout](#)

Project Dashboard

[Edit Project](#)
Name: SCO 2008
Description: Supply Chain Optimization - identifying optimal inventory levels at each part of the supply chain, redesigning chain as necessary

[Add Checkpoint](#)

Checkpoint	Data points	L/S average	PM average	CM average	Options
Project Launch	0	N/A	N/A	N/A	Review Get Data Edit

Begin by clicking Get Data to populate the checkpoint with PCT data either via a web form or manually

Get Data

When you select Get Data from the Project Dashboard you come to a page with two data collection options.

Get Data Online: This option provides you a dynamic web address that you can email to individuals from whom you would like to collect PCT assessment data. The coding at the end of the url tells the tool which Project and Checkpoint the data is for. You will need to send this url to people you are collecting data from.

Add Data Manually: This option is available for you to enter your own assessment information, or if you have collected the data on paper assessments and would like to add it to the Analyzer.

* Notice that the project name, project description, checkpoint name and checkpoint description are shown at the top of the page.

The screenshot shows a web browser window titled "Prosci PCT Application - Get Checkpoint Data - Windows Internet Explorer". The address bar shows the URL: http://www.change-management.com/pct-analyzer/index.pl?action=checkpoint_data_info&id=48. The page content includes the "Change Management Learning Center" logo, the "Prosci PCT Analyzer" title, and a "Prosci PCT" logo. A "Homepage" link is visible in the top right. The main content area is titled "Checkpoint: Get Data" and includes a "Return to Project Dashboard" link. Below this is a table with the following information:

Project name:	SCO 2008
Project description:	Supply Chain Optimization - identifying optimal inventory levels at each part of the supply chain, redesigning chain as necessary
Checkpoint name:	Project Launch
Checkpoint description:	4/1/2008 - Project charter and funding approved, project launch initiated

Below the table, there is a section titled "Get Data Online" with the following text: "This is the url that you should send to people who you want to submit data for the PCT assessment for this checkpoint. Be sure to copy the entire url as it includes code that tells the PCT Analyzer what project and checkpoint the PCT assessment is being completed for." A text box contains the URL: <http://www.change-management.com/pct-analyzer/cd.pl?c=9RuTJsOt4L>. A red arrow points to this URL. Below the text box is a section titled "Add Data Manually" with the text: "If you wish to enter data manually, [click here](#) to do so."

This is the url to copy and paste into an email when requesting data. The tool does not send it automatically, as it is important for you to provide the proper context regarding the assessment and how you will use the data. This context is best set in a personal email from you to the people you are asking to submit data.

Data collection page

This is the webpage that a user sees when you email the **data collection url** that was provided on the Get Data page for your project and checkpoint.

* Notice that the user sees the project name, project description and checkpoint name on the page they visit to provide PCT assessment data.

The page includes a brief description of the model and guidelines for completing the assessment. There will also be a narrated presentation available from the link in the upper right in the future.

The person providing the data must include their Name, Email address and Relation to the project in order to submit data.

Prosci PCT Analyzer

Complete a Prosci PCT Assessment

The PCT Assessment is a tool for evaluating the Leadership/sponsorship, Project Management and Change Management on a given project. The assessment includes 10 questions for each of these three elements. You will score each statement on a 1 to 3 scale.

- '1' = **Inadequate** - a score of a '1' means that your project fails to meet the qualities described in the statement.
- '2' = **Adequate** - a score of a '2' means that your project does meet the qualities described in the statement, however this is not viewed as a strength of the project.
- '3' = **Exceptional** - a score of a '3' means that not only do the qualities exist for your project but they are also considered a strength or asset to the overall project.

You are completing the assessment for the following project:

Project name:	SCO 2008
Project description:	Supply Chain Optimization - identifying optimal inventory levels at each part of the supply chain, redesigning chain as necessary
Checkpoint name:	Project Launch

Name:

Email address:

Relation to the project:

Leadership/sponsorship factor assessment

Data collection page

Once the person completing the assessment enters their Name, Email address and Relation to the project, they evaluate each PCT assessment statement by selecting 1, 2 or 3 in the column on the right.

* The PCT assessment has 10 questions for Leadership / Sponsorship, 10 questions for Project Management and 10 questions for Change Management.

When the person submitting data reaches the bottom of the assessment, they simply click 'Submit' and they are finished. The data will be available from your PCT Analyzer Project Dashboard.

You are completing the assessment for the following project:

Project name:	SCO 2008
Project description:	Supply Chain Optimization - identifying optimal inventory levels at each part of the supply chain, redesigning chain as necessary
Checkpoint name:	Project Launch

Name:

Email address:

Relation to the project:

Leadership/sponsorship factor assessment

1. The change has an executive sponsor.	<input type="radio"/> 1 = Inadequate <input type="radio"/> 2 = Adequate <input type="radio"/> 3 = Exceptional
2. The executive sponsor has the necessary authority over the people, processes and systems to authorize and fund the change.	<input type="radio"/> 1 = Inadequate <input type="radio"/> 2 = Adequate <input type="radio"/> 3 = Exceptional
3. The executive sponsor is willing and able to build a sponsorship coalition for the change, and is able to manage resistance from other managers and supervisors.	<input type="radio"/> 1 = Inadequate <input type="radio"/> 2 = Adequate <input type="radio"/> 3 = Exceptional
4. The executive sponsor will actively and visibly participate with the project team throughout the entire project.	<input type="radio"/> 1 = Inadequate <input type="radio"/> 2 = Adequate <input type="radio"/> 3 = Exceptional
5. The executive sponsor will resolve issues and make decisions relating to the project schedule, scope and resources.	<input type="radio"/> 1 = Inadequate <input type="radio"/> 2 = Adequate <input type="radio"/> 3 = Exceptional

Project Dashboard with data

As data is submitted, you will see the summary details in the table on your Project Dashboard.

In the example, three assessments have been completed at the *Project Launch* Checkpoint for the *SCO 2008* Project.

Once data has been submitted, the Review link in the far right column is activated. Click this link to see the output for the specific checkpoint:

- Profile data
- Question level data
- Profile analysis
- Question level analysis

Prosci PCT Analyzer

Project Dashboard

[Edit Project](#)
Name: SCO 2008
Description: Supply Chain Optimization - identifying optimal inventory levels at each part of the supply chain, redesigning chain as necessary

[Add Checkpoint](#)

Checkpoint	Data points	L/S average	PM average	CM average	Options
Project Launch	3	21.7	22.7	11.3	Review Generate Data

The Review link takes you to the Checkpoint Review page in the PCT Analyzer that shows you the data analysis as well as the consequences and next steps based on the data you have collected.

Checkpoint Review

The **Checkpoint Review** page presents a tremendous amount of information for your Checkpoint. This is where all the data that has been submitted is calculated and analyzed.

At the top of the page, you'll see the Checkpoint Details: project name, project description, checkpoint name and checkpoint description.

Action heading: this link generates a report that you can save, print and email

Checkpoint Data Providers heading: this section shows who submitted data for your checkpoint, their Leadership / Sponsorship, Project Management and Change Management scores. You can also click See scores to review their specific submission.

Prosci PCT Analyzer

Checkpoint Review
Return to Project Dashboard

Checkpoint Details

Project name:	SCO 2008
Project description:	Supply Chain Optimization - identifying optimal inventory levels at each part of the supply chain, redesigning chain as necessary
Checkpoint name:	Project Launch
Checkpoint description:	4/1/2008 - Project charter and funding approved, project launch initiated

Action
Generate a report that you can share with others
This report includes both the data summary and analysis of consequences and next steps.

Checkpoint Data Providers

Name	Email	L/S	PM	CM	Date Completed	Options
Bob Jones	bjones@prosci.com	17	23	12	3/14/2008	See scores Delete
Sally Smith	ssmith@prosci.com	20	21	12	3/14/2008	See scores Delete
John Johnson	jjohnson@prosci.com	28	24	10	3/14/2008	See scores Delete
Email All Data Providers						

Profile Data

Quick links to email your data providers

Click See scores to review a completed assessment

Checkpoint Review: Profile Data

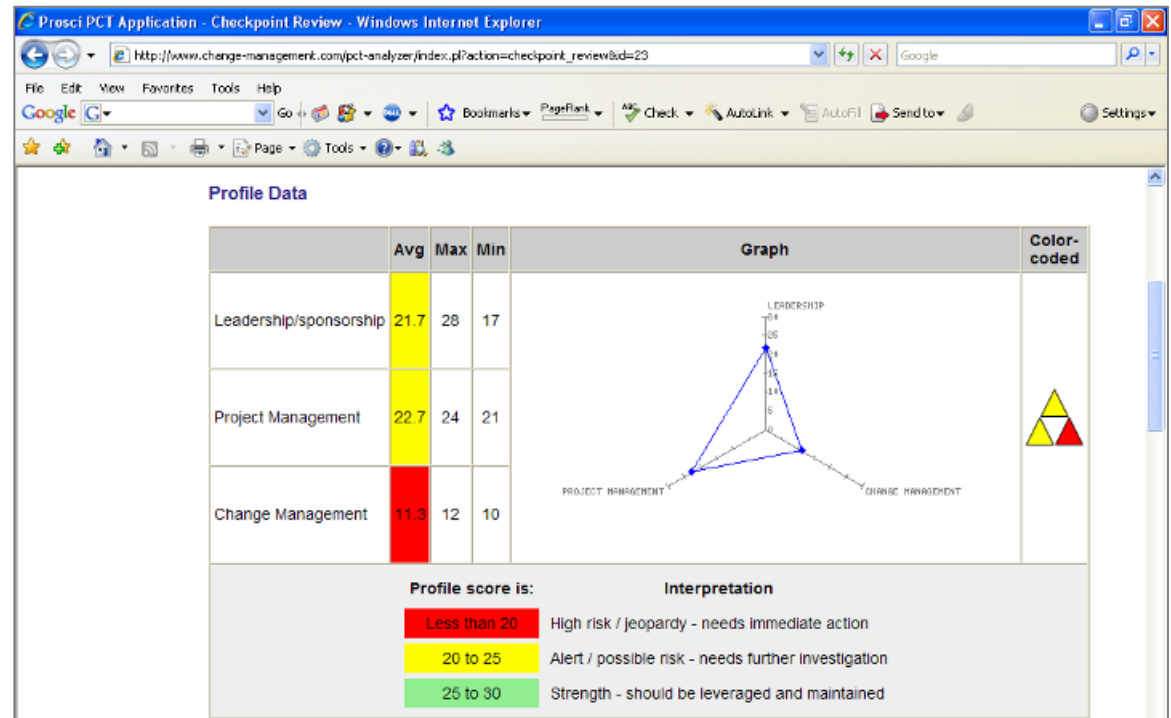
Profile Data: This section provides the average score, maximum and minimum for each element (L/S, PM and CM). It also generates a radar graph of the shape of your triangle and a color-coded triangle indicating strengths, alerts and jeopardy areas.

Strength area: scores greater than 25

Alerts areas: scores between 20 and 25

Jeopardy areas: scores below 20

A stop light approach is used for color coding – red for jeopardy, yellow for alerts and green for strengths.



Checkpoint Review: Question Level Data

Question Level Data: This section provides the average score and the score distribution (how many scores of '1', scores of '2' and scores of '3') for each PCT assessment question.

The average scores are analyzed based on high risk areas that require immediate attention (averages less than 2), sufficient areas where there is potential to improve (averages between 2 and 2.5) and asset areas that should be leveraged (averages above 2.5).

A stop light approach is used for color coding each question – red indicating high risk, yellow for questions that should be addressed and green for assets that should be leveraged.

Question Level Data

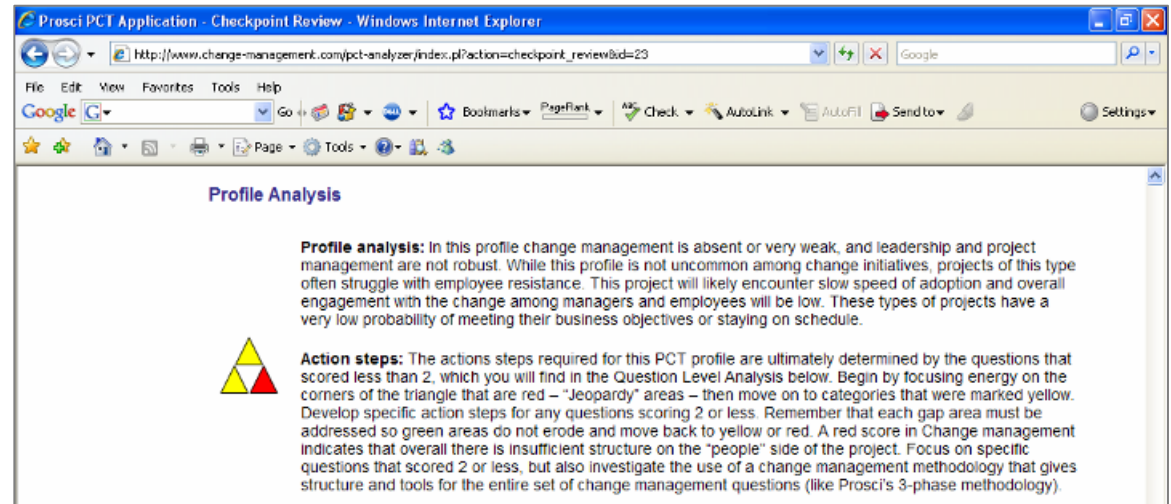
Average is:	Interpretation
Less than 2	Project fails to meet the qualities described in the statement. This is a high risk area that you should create immediate action steps to correct.
Between 2 and 2.5	Project meets qualities in statement, but this is not strength. Evaluate potential alternatives to improve performance in this area.
Above 2.5	This quality in the statement exists and is considered an asset. Leverage this characteristic of the project.

Leadership/sponsorship factor assessment					
#	Question	Avg	1s	2s	3s
1.	The change has an executive sponsor.	2.3	0	2	1
2.	The executive sponsor has the necessary authority over the people, processes and systems to authorize and fund the change.	2.7	0	1	2
3.	The executive sponsor is willing and able to build a sponsorship coalition for the change, and is able to manage resistance from other managers and supervisors.	1.7	1	2	0
4.	The executive sponsor will actively and visibly participate with the project team throughout the entire project.	2.0	1	1	1
5.	The executive sponsor will resolve issues and make decisions relating to the project schedule, scope and resources.	2.3	0	2	1
6.	The executive sponsor can build awareness of the need for the change (why the change is happening) directly with employees.	2.0	1	1	1
7.	The organization has a clearly defined vision and strategy.	2.3	0	2	1
8.	This change is aligned with the strategy and vision for the organization.	1.7	2	0	1
9.	Priorities have been set and communicated regarding this change and other competing initiatives.	2.3	0	2	1
10.	The sponsor will visibly reinforce the change and celebrate successes with the team and the organization.	2.3	0	2	1

Checkpoint Review: Profile Analysis

Profile Analysis: The PCT Analyzer calculates the average scores for each of the three elements and generates a radar graph and a color-coded triangle or profile.

* Based on the profile shown by the color coded triangle, you are given analysis and action steps for your specific profile.



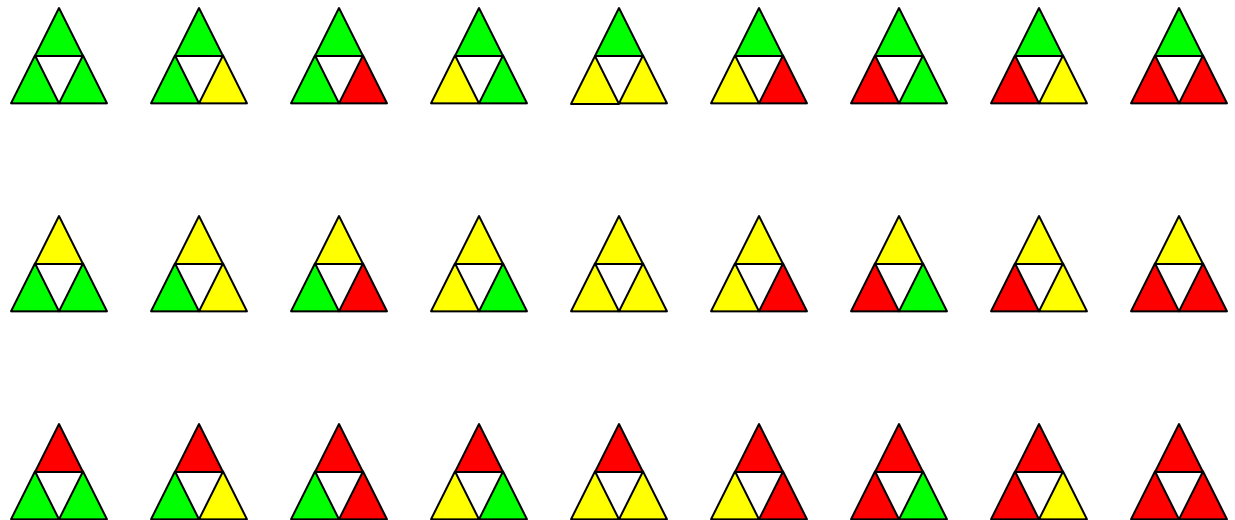
Given the three PCT elements:

- Leadership/Sponsorship
- Project Management
- Change Management

And the three possible outcomes:

- Red = jeopardy
- Yellow = alert
- Green = strength

There are 27 possible profiles.



Checkpoint Review: Question Level Analysis

Question Level Analysis: The PCT Analyzer calculates an average for each specific question in the PCT Assessment.

* For any question with a score of less than 2, the PCT Analyzer provides:

- Discussion
- Consequences of a low score
- Action steps.

With the output in the Question Level Analysis, you can quickly create an action plan for improving the performance of the project.

Question Level Analysis
Data is provided for each question that scores less than 2.

Leadership/sponsorship factor assessment		
#	Question	Score
3.	<i>The executive sponsor is willing and able to build a sponsorship coalition for the change, and is able to manage resistance from other managers and supervisors.</i>	1.7
<p>Discussion: Sponsorship is not just the action of one person. Sponsorship is the collective action of all senior leaders or managers whose areas or departments impacted by your change. The actions of this "coalition of sponsorship" enables employees to understand the need for change and how the change aligns with the direction of the organization. The sponsor coalition is also the vehicle for managing resistance among managers and employees in the organization.</p> <p>Consequences of a low score: If you scored low in this area, you will likely experience pockets of resistance throughout the organization. The weaker the coalition of business leaders, the more resistance you can expect. Without a strong coalition, you may also find managers confused about the priority of this change compared to other work they are doing. Employees will likely have a low awareness of the need for change since employees look to their local leadership for this information.</p> <p>Action steps: Provide your primary sponsor with a sponsor assessment diagram that shows the current strengths and weaknesses of the sponsor coalition. Coach them on the methods and tools for building sponsorship among their peers and lower level managers. Use Prosci's sponsor competency assessment as a coaching tool and checklist. Help identify pockets of resistance and coach your sponsor on how to manage this resistance.</p>		
8.	<i>This change is aligned with the strategy and vision for the organization.</i>	1.7
<p>Discussion: A change project is aligned with the vision and strategy for the organization when a clear connection is present between the success of the change and the achievement of the organization's strategy.</p> <p>Consequences of a low score: If you scored low in this area, your change may struggle to establish priority against other projects that directly support the strategy. Changes that are not aligned with the strategy are often cancelled or delayed when there is a conflict of resources or limited funding. Changes that are not aligned with the overall strategy and vision also have difficulty securing the sponsorship they need at an executive level and tend to exist in the background until they are formally cancelled or just fade away from lack of leadership attention.</p> <p>Action steps: Review the strategy and vision for your organization. Compare the business objectives of your change initiative with this strategy. Make this connection visible to others in every presentation and communication about your project. Coach your primary sponsor to also make visible the connection between your project work and the strategy for the organization.</p>		

Site map review

- PCT Analyzer Homepage – **Add or access Projects**
 - Project Dashboard – **Add or access Checkpoints**
 - Checkpoint: Get Data – **Manual or web form address**
 - Checkpoint Review – **Profile data, Question level data, Profile analysis, Question level analysis**

Tips and advice: How to use Checkpoints

- In the design of the tool, a deliberate decision was made to leave the definition of checkpoints very flexible. As the user, you can decide how to 'slice' your data using checkpoints. Here are a couple of possible ways to use checkpoints.

Mapped to project gates:

Checkpoint 1: Project initiation
Checkpoint 2: Project planning
Checkpoint 3: Project design
Checkpoint 4: Project implementation
Checkpoint 5: Project closure

With different groups:

Checkpoint 1: Project team
Checkpoint 2: Business Unit A
Checkpoint 3: Business Unit B
Checkpoint 4: Business Unit C

At a particular frequency:

Checkpoint 1: Today
Checkpoint 2: 1 month check-in
Checkpoint 3: 2 month check-in
Checkpoint 4: 3 month check-in
Checkpoint 5: 6 month check-in
Checkpoint 6: 9 month check-in

Tips and advice: How to request data

- The tool was intentionally designed to not send an email directly to people you want collect data from. We felt it was important that you introduce the assessment effectively. Consider the difference between these two emails:

To: Team
From: You

Here is an assessment.
Follow the url and answer
the questions.

To: Team
From: You

The Prosci Project Change Triangle (PCT) is a simple but powerful tool for seeing how well our projects are performing. It will help us evaluate the strengths and opportunities in Leadership, Project Management and Change Management. I would like your input on the X project. Follow the link below to share your perspective. Please provide your honest and candid feedback within the next 5 days.

There are only 10 questions for each element, and it shouldn't take you more than 10-15 minutes. I will collect the data and then share back with you our score statistics, analysis and action steps for moving the project forward.

How to get started

1. Create your profile
2. Add a project – even if you enter “Beta” project
3. Add a checkpoint – even if you call it “Gamma”
4. Click on Get Data, then use the manual entry page to add one data point to the tool
5. From the Project Dashboard, click Review data for your checkpoint
6. Explore the output – and begin to think about how you’ll use it on your projects!



Email changemanagement@prosci.com
or call 970-203-9332 with any comments,
questions or suggestions.

Visit the PCT Analyzer website for additional
information or to place your order:
www.change-management.com/pct-analyzer.htm

PCT Analyzer access for up to 5 projects - \$149

PCT Analyzer access for unlimited projects - \$349

Appendix: PCT Assessment questions

The following pages show the 10 questions for Leadership/Sponsorship, the 10 questions for Project Management and the 10 questions for Change Management

Leadership/Sponsorship assessment

1. The change has an executive sponsor.	
2. The executive sponsor has the necessary authority over the people, processes and systems to authorize and fund the change.	
3. The executive sponsor is willing and able to build a sponsorship coalition for the change, and is able to manage resistance from other managers and supervisors.	
4. The executive sponsor will actively and visibly participate with the project team throughout the entire project.	
5. The executive sponsor will resolve issues and make decisions relating to the project schedule, scope and resources.	
6. The executive sponsor can build awareness of the need for the change (why the change is happening) directly with employees.	
7. The organization has a clearly defined vision and strategy.	
8. This change is aligned with the strategy and vision for the organization.	
9. Priorities have been set and communicated regarding this change and other competing initiatives.	
10. The sponsor will visibly reinforce the change and celebrate successes with the team and the organization.	
Score: (total possible is 30)	

Project Management assessment

1. The change is clearly defined including what the change will look like and who is impacted by the change.	
2. The project has a clearly defined scope.	
3. The project has specific objectives that define success.	
4. Project milestones have been identified and a project schedule has been created.	
5. A project manager has been assigned to manage the project resources and tasks.	
6. A work breakdown structure has been completed and deliverables have been identified.	
7. Resources for the project team have been identified and acquired based on the work breakdown structure.	
8. Periodic meeting are conducted with the project team to track progress and resolve issues.	
9. The executive sponsor is readily available to work on issues that impact dates, scope or resources.	
10. The project plan has been integrated with the change management plan.	
Score: (total possible is 30)	

Change Management assessment

1. A structured change management approach is being applied to the project.	
2. An assessment of the change and its impact on the organization has been completed.	
3. An assessment of the organization's readiness for change has been completed.	
4. Anticipated areas of resistance have been identified and special tactics have been developed.	
5. A change management strategy including the necessary sponsorship model and change management team model has been created.	
6. Change management team members have been identified and trained.	
7. An assessment of the strength of the sponsorship coalition has been conducted.	
8. Change management plans including communications, sponsorship, coaching, training and resistance management have been created.	
9. Feedback processes have been established to gather information from employees to determine how effectively the change is being adopted.	
10. Resistance to change is managed effectively and change successes are celebrated, both in private and in public.	
Score: (total possible is 30)	

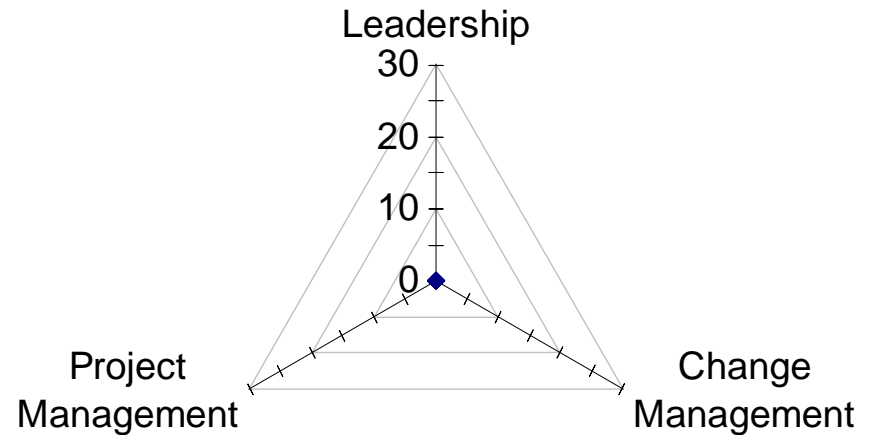
PCT assessment results

Represent your project's results in a radar graph

- Leadership/sponsorship score:
- Project management score:
- Change management score:

Which questions scored a '1'?

Prosci PCT profile



* The shape of the triangle represents your PCT profile