WEBINAR
How to Integrate Change Management and Project Management

- a Prosci® webinar delivered by proacteur

HOW TO INTEGRATE CM AND PM

- Defining The Elements of Successful Change
- Integrating Change Management and Project Management
- Understanding the Five Keys to Effective Integration
HOW TO INTEGRATE CM AND PM

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- Understanding the Five Keys to Effective Integration

Organizational Change

Made Up of Individual Changes

Current  Transition  Future

C C C C C  T T T T T  F F F F F
C C C C C  T T T T T  F F F F F
C C C C C  T T T T T  F F F F F
C C C C C  T T T T T  F F F F F
C C C C C  T T T T T  F F F F F
Successful Change Requires Both the Technical and People Sides

![Diagram showing technical and people sides with phases: Current state, Transition state, Future state, Design, Develop, Deliver, Installation*, Results, Outcomes, Success, Embrace, Adopt, Use, Realization*]

Comparing Change Management and Project Management

**Focus:**
- **Technical side** of moving from current state to future state
  - Project Management
  - Change Management

**Focus:**
- **People side** of moving from current state to future state

**Process:**
- **Project Management**
  - Initiation
  - Planning
  - Executing
  - Monitoring/controlling
  - Closing

- **Change Management**
  - Organizational:
    - Preparing for change
    - Managing change
    - Reinforcing change™
  - Individual:
    - ADKAR™

**Tools:**
- **Project Management**
  - Statement of work
  - Project charter
  - Business case
  - Work breakdown structure
  - Budget estimations
  - Resource allocation
  - Schedule
  - Tracking

- **Change Management**
  - Individual change model
  - Readiness assessment
  - Communication plans
  - Sponsor roadmaps
  - Coaching plans
  - Training plans
  - Resistance management
  - Reinforcement
Definition Comparison

**Project Management**
is the discipline of initiating, planning, executing, controlling, and closing the work of a team to achieve specific goals and meet success criteria.

**Change Management**
is the application of a structured process and set of tools for leading the people side of change to achieve a desired outcome.

Successful projects require all three corners of the Prosci® PCT™ Model

*Prosci® PCT™ Model*

- Leadership/Sponsorship
- Projects meet objectives
- Projects finish on time and on budget
- Return on investment (ROI) realized

Project Management

Change Management

L/S  PM  CM
L/S  PM  CM
L/S  PM  CM
L/S  PM  CM

What Are We Trying to Achieve?

**Organizational Benefits**
- Revenue
- Costs
- Profits
- Efficiencies
- Compliance
- Safety
- Process Excellence
- Customer Satisfaction

**Project Objectives**
- Metrics and measurements of specific improvements
- What the project is trying to deliver
- How the organization will be different after the change is implemented

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**Prosci® ADKAR® Model**

- **Awareness**
  - Of the need for change
  - Of the nature of the change

- **Desire**
  - To support the change
  - To participate and engage

- **Ability**
  - To implement the change
  - To demonstrate performance

- **Knowledge**
  - On how to change
  - On how to implement new skills and behaviors

- **Reinforcement**
  - To sustain the change
  - To build a culture and competence around change

- **Leadership/Sponsorship**

- **Projects, goals, objectives**

- **Projects and initiatives** need to be done and on budget

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HOW TO INTEGRATE CM AND PM

- Defining The Elements of Successful Change
- Integrating Change Management and Project Management
- Understanding the Five Keys to Effective Integration

Project Management and Change Management are complementary disciplines with a common objective.
Foundation of Integration

Technical Side

Current state  Transition state  Future state

People Side

Design
Develop
Deliver

Embrace
Adopt
Use

Installation*

Results Outcomes Success

Realization*

* Daryl Conner

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Individual:

Awareness  Desire  Knowledge  Ability  Reinforcement

Organizational:

Communications Plan
Sponsor Roadmap
Coaching Plan
Training Plan
Resistance Mgmt

Phase 1: Preparing for Change
Phase 2: Managing Change
Phase 3: Reinforcing Change

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Let’s Walk Through This Together

The Work Streams Are What We Can Integrate into the Project Plan

<table>
<thead>
<tr>
<th>Initiate</th>
<th>Plan</th>
<th>Design</th>
<th>Develop</th>
<th>Deploy</th>
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**Kick Off**

A

D

K

A

R

**Phase 1:** Preparing for Change

- Strategy

**Phase 2:** Managing Change

- Communications Plan
  - Sponsor Roadmap
  - Coaching Plan
  - Training Plan
  - Resistance Management Plan

**Phase 3:** Reinforcing Change

- Sustainment

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‘Ability at Go Live’ Exercise

<table>
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<tr>
<th>Initiate</th>
<th>Plan</th>
<th>Design</th>
<th>Develop</th>
<th>Deploy</th>
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**Kick Off**

1. Begin with key project events

**“Go Live”**

2. Lay in the individual milestones

- A
  - D
  - K
  - A
  - R

3. Consider differences in impacted groups

4. Align organizational deliverables to drive individual milestones

- Phase 1: Preparing for Change
- Phase 2: Managing Change
- Phase 3: Reinforcing Change

- Strategy
- Plans
- Sustainment
How Can We Integrate Change Management into a Project

Project Management
Design, Develop and Deliver Solution Effectively

Change Management
Solution is Embraced, Adopted and Used Proficiently

Integrating CM & PM

And it mattered:
“Good” or “Excellent” CM

71% Integrated CM & PM

Did

Didn’t

Did Did’t
Integrating CM and PM

**People Dimension**

- **37%**
  - PM
  - CM

- **21%**
  - PM
  - CM

- **14%**
  - PM
  - CM

- **22%**
  - PM & CM

**Collaboration**

**Cross-training**

**Define Roles and Responsibilities**

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Integrating CM and PM

**Process Dimension**

- **Integrate Plans**
- **Align Timelines**
- **Sequence Tasks**
- **Add Deliverables**

<table>
<thead>
<tr>
<th>2017</th>
<th>2018</th>
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PM

CM

P1 – Preparing for Change
P2 – Managing Change
P3 – Reinforcing Change
### Change Management Activities

- Initiate Project
- Scope Project
- Plan Project
- Establish objectives
- Document approach
- Define team and budget requirements
- Design Solution
- Benchmark and gather data
- Generate ideas and select concepts
- Model solutions
- Document requirements
- Develop Solution
- Evaluate alternatives
- Architect solution
- Conduct readiness assessments and impact analysis
- Identify and begin building sponsor coalition
- Select and prepare change management team
- Identify and address anticipated resistance
- Communicate why change is happening (sponsors)
- Prepare and equip managers and supervisors
- Continue communications and sponsorship activities
- Launch group and coaching sessions
- Reinforce key messages (sponsors)
- Continue communications and sponsorship activities
- Identify training requirements and develop training
- Continue communications, sponsorship and coaching activities

### Integrating CM and PM

<table>
<thead>
<tr>
<th>Tool Dimension</th>
<th>Percentage</th>
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<tbody>
<tr>
<td>Communication Plan</td>
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<tr>
<td>Project Plan</td>
<td>81%</td>
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<tr>
<td>Training Plan</td>
<td>79%</td>
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<tr>
<td>Schedule</td>
<td>78%</td>
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<tr>
<td>Stakeholder Analysis/Assessment</td>
<td>68%</td>
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<tr>
<td>Impact Analysis/Assessment</td>
<td>65%</td>
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<tr>
<td>Scope</td>
<td>60%</td>
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<tr>
<td>Lessons Learned</td>
<td>56%</td>
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<td>Risk Analysis/Assessment/Log</td>
<td>54%</td>
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<tr>
<td>Business Case</td>
<td>52%</td>
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<tr>
<td>Readiness Assessment</td>
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HOW TO INTEGRATE CM AND PM

Defining The Elements of Successful Change

Integrating Change Management and Project Management

Understanding the Five Keys to Effective Integration

Prerequisites to Integration

Both teams are focused on results and outcomes

There is a structured approach to change management
5 Keys to Effective Integration

1. Support and buy-in from project teams
2. Support from leadership
3. Scope, timing and prioritization
4. Direction on how to integrate
5. Role definition and clarity

Support and Buy-In from Project Teams

Make Change Management meaningful and real by connecting to what the project team cares about
1 Support and Buy-In from Project Teams

- Improve project results and outcomes
- Drive benefit realization and financial return
- Minimize risks
- Reduce “re” costs

Met or exceeded objectives
On schedule
On budget

Change Management Effectiveness

2 Support From Leadership

- Participate actively and visibly throughout the project.
- Build a coalition of sponsorship with peers and managers.
- Communicate directly with employees.

Prosci® PCT™ Model

Leadership/Sponsorship
Projects meet objectives
Projects finish on time and on budget
Return on investment (ROI) realized

Project Management
Change Management
2 Support From Leadership

- Leadership/Sponsorship
  - Resources
  - Strategy and scope
  - Active and visible participation
  - Direct communication
- Executive decisions
- Timing and dates
- Projects meet objectives
- Projects finish on time and on budget
- Return on investment (ROI) realized
- Coalition building
- Project Management
- Change Management

3 Scope, Timing, and Prioritization

- Proactive (not fire fighting)
- “Adoption and usage” from the beginning

- % that met or exceeded objectives
  - Initiation: 64%
  - Planning: 56%
  - Design: 49%
  - Implementation: 37%
  - Closure: 0%

Prosci 2013 Benchmark Data
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4 Direction on How to Integrate

- Project Management: Design, Develop and Deliver Solution Effectively
- Change Management: Solution is Embraced, Adopted and Used Proficiently

5 Role Definition and Clarity

- Organization Structure
- Change Structure
  - Structure Enable
  - Change resource/team
  - Project Team
  - Integrate Focus
  - Project SMEs and support
  - Expertise Experience
Thanks for attending today's event

The presentation will be available on www.proacteur.com within a few days

For questions please email mka@proacteur.com

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