Project Managers are great Change Managers too!

Author

Melanie Franklin

Director

Agile Change Management Limited

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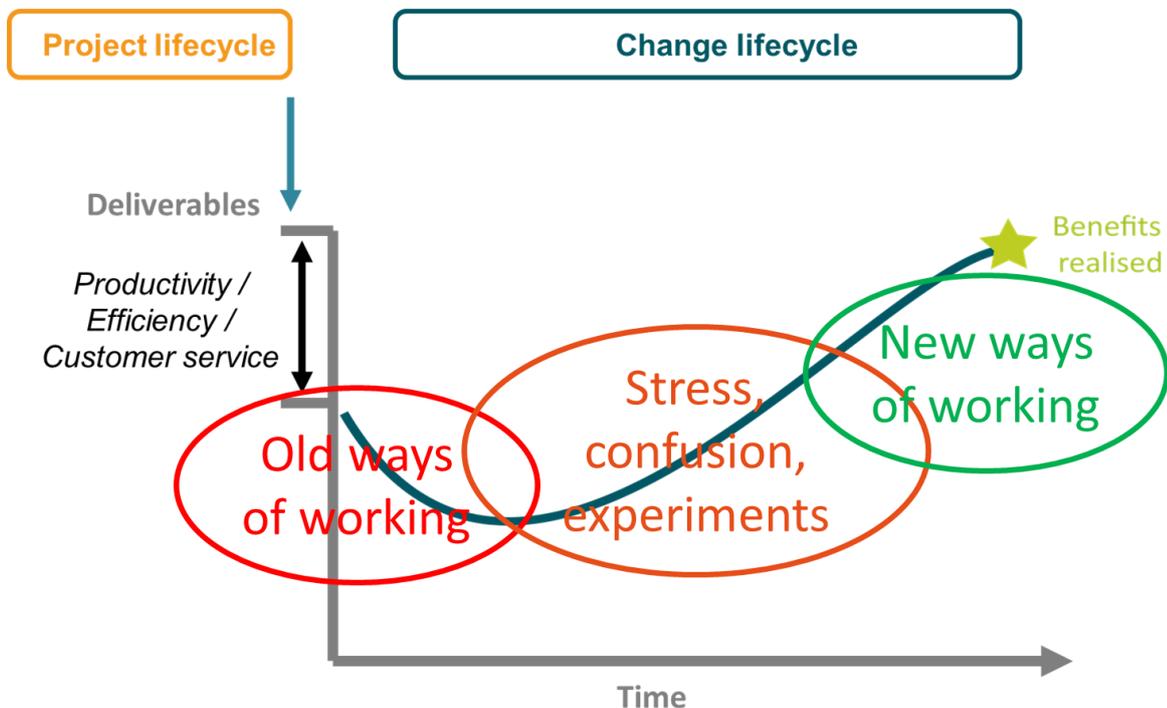
While preparing for a webinar and subsequent speech to a large audience of project and change professionals I realised that many of these experts were not aware of their skills in delivery change as part of their projects. As such, I decided to write this brief article that would lay out the factors that I consider relevant to any project manager transferring their skills to the world of change management. I hope you enjoy it and it provides confidence to your own project delivery and career planning.

Projects trigger change

Projects trigger change and the really smart project managers recognise this and occupy this space. They don't talk just about delivery and deadlines and budgets and Gantt charts. They talk about winning hearts and minds and getting people engaged. They know that benefits cannot be realised unless those who are supposed to be using the project deliverables actually do so.

<figure>
Project lifecycle | Change lifecycle

Deliverables

Productivity / Efficiency / Customer service

Old ways of working

Stress, confusion, experiments

New ways of working

Benefits realised

Time
</figure>

Projects are difficult

Any project forces users along a difficult path. They move from comfort and stability in how things work into a period of uncertainty as their old procedures and systems are dismantled and replaced with an approach that they have never used before. They become fearful of making mistakes and feel under pressure to be come as proficient in the new ways of working as they were in the old ways as quickly as possible. With plenty of practice, lots of encouragement and an environment that supports trial and error they can acquire

the necessary proficiency but it won't happen overnight. As project managers we have to respect this and build all of their practice activities into our project plans.

Integrate project and change management

Ideally project management and change management become integrated. This might mean that the project lifecycle becomes extended as the transition activities for leading people through change are included in the project plan, but this additional cost realises the benefits of increased usage of the project deliverables and therefore increased benefits from the project.

Project Lifecycle

Change management increases the workload for project managers but it is worth it. All this effort increases the chances of adoption of project deliverables by users which leads to the improvements, advantages and benefits that were promised in the original project business case.

I understand what needs to change in business as usual

I appreciate what people are losing

I can identify all those impacted by the project deliverables (Customers, Suppliers and Regulators)

I have identified the support needed as people transition from old ways of working to new ways of working

I have helped those impacted overcome their fear of change

I know the importance of communicating the drivers for change

I am giving my stakeholders relevant information about the impact of my project

I have included transition activities in my project plan

I have negotiated for resources to support this transition

I will assess the readiness for change before my project goes live to maximise the chances of use

Those impacted use the project deliverables

Benefits in project business case realised as project deliverables are adopted

Project Manager job descriptions no include change

I said earlier that great project managers recognise that they are in the business of delivering change and those who hire project managers have caught up with this thinking and are demanding change management skills as part of the ideal project management toolkit. Look at these recent project manager job descriptions for examples of the skills expected:

"I have a need for a Project Manager to work for a major retail bank on a Finance Change Project. This is a purely business change position. The ideal candidate will have long running experience of delivering finance change projects in large banking environments. Excellent stake holder management is also required."

"The Project Manager must be able work around projects that are changing on a day to day basis and has experience in Infrastructure, Software, Development and HR Systems. You will have experience in:
- *Stakeholder Involvement and Management*
- *Change Management experience*
- *E-Commerce*
- *Communication*
- *Infrastructure"*

6 reasons by 'Change' is important

I was at a conference recently where a common observation was that change management was not on the agenda three years ago but now it's all that anyone wants to talk about.

1. Benefits Management: there is increasing recognition that benefits management is an important element of project management. Emphasis is not just on project delivery but also on realising benefits as a result of this delivery. There is more demand from project 'authorisers' to ensure that there are benefits identified and always in which they can be measured before the project goes live. This helps those planning the project and those who will be impacted by it to start a conversation about what needs to change in the current 'business as usual' environment to realise the benefits.

2. Increased use of Agile: the move towards agile project management means that projects don't just deliver once at the end, but they drip feed project deliverables to their users throughout the project, which means users have to continually change their processes to accommodate these deliverables. Agile environments only work if organisations are good at implementing change.

3. Value for money: the financial crisis from 2008-2013 created a behavioural and social shift. It has created the expectation that people will ask for a discount and will be looking for value for money from any

investment they make. This includes projects, which ties back to the increasing emphasis on benefits management. Project sponsors need to know that the project budget is going to lead to tangible, visible benefits that clearly prove that spending on the project was a worthwhile investment.

4. Multiple interdependencies: the multiplicity of projects and their interconnectedness with each other means that one project can impact on many different business processes, departments, staff and systems. There is plenty of scope for unintended consequences so we need to make sure we manage the back end of our projects i.e. the impact that they have which means we need excellence in change management.

5. Helping the Business: there are so many projects that we are in danger of overwhelming the business which generates the revenue to pay for the projects in the first place! A robust change management approach assesses the readiness for change and will only authorise project go-live if the business has prepared for the change and has sufficient capacity to cope with an initial fall in productivity as staff adapt to new ways of working.

6. The Business now owns the project: in recent years there has been a shift in ownership of projects from the project function, often owned by IT or the PMO into the business. This means that the business has a vested interest in ensuring that work can still be done even when staff are grappling with the implementation of new project deliverables. So they demand change management plans that identify all of the preparation activities needed to make go-live go smoothly.

What does great Change Management look like?

So what does great change management look like? The aim is to enable our users, the ones that have to adopt the project deliverables into how they work, to have a 'transforming' idea. We want them to come to the realisation that the project deliverables have the ability to make their work easier, quicker to perform or more interesting. Once they have this idea, then they are willing to help us design, develop and test the project deliverables.

It is this participation that prepares them for using the project deliverables so we need to do all we can to achieve this. Our project plans need to include a wide variety of transition activities, capable of appealing to the widest possible group of users.

These activities need to cover all aspects of the project lifecycle:

• **Requirements gathering and project scoping**
   The process of identifying the project deliverables starts an understanding of how business as usual might need to change. This helps to clarify the scope of the project, and if it is done well this scope will recognise the impact of the project not just on the intended audience but also those inadvertently affected by the project, who will also need to change how they work.
• **Impact assessment**

Identifying who is going to be affected and how they are going to be affected enables users to contribute these preparation activities to the project plan. Users take responsibility for identifying what needs to change and what can be retained from the current 'business as usual' environment.

- **Testing of project deliverables**
  Getting involved in the testing of project deliverables gives users a feeling of involvement and ownership. This helps them to recognise that change is really going to happen and that they need to prepare for it. Understanding how things work via the testing generates ideas about how they might be used in practice

- **Readiness assessments**
  Identifying what preparation is needed to get ready for the change helps everyone to get involved, as they each need to change how they work and to think through how the project deliverables will make a difference to what they do, when they do it and how they do it.

People are different

People engage with change differently, based on their personality type and their previous experience of change. Using some of the well-known personality profiling tools I have identified 4 groups, all of whom are capable of making a very substantial contribution to successful change management. Include transition activities in your project plan that addresses the needs of each of these groups to maximise your chances of success.

1.   Holding onto the current situation – individuals with this preference are great at keeping the scope of the project and the consequent changes manageable. Their desire not to change means they will review what is being proposed with some scepticism and will try to stop the project team 'overdoing things'. People with this preference are very good at encouraging us to provide proof that things will work so they are supportive of pilots and prototypes instead of 'big bang' roll-outs. To get the best from these resources, they will need some flexibility in how to use the project deliverables and the autonomy to retain some of the existing ways of working.

Adding more to the change

Making the change happen

Putting the change into a wider context

Holding onto the current situation

2.   Putting the change into a wider context – looking for connections with other initiatives, seeing how the change connects to the longer term aims. People with these preferences challenge the project team because their need to 'join the dots' and align the project to the wider strategic direction of the organisation means they ask a lot of questions about inter-dependencies with other initiatives. They can also be very
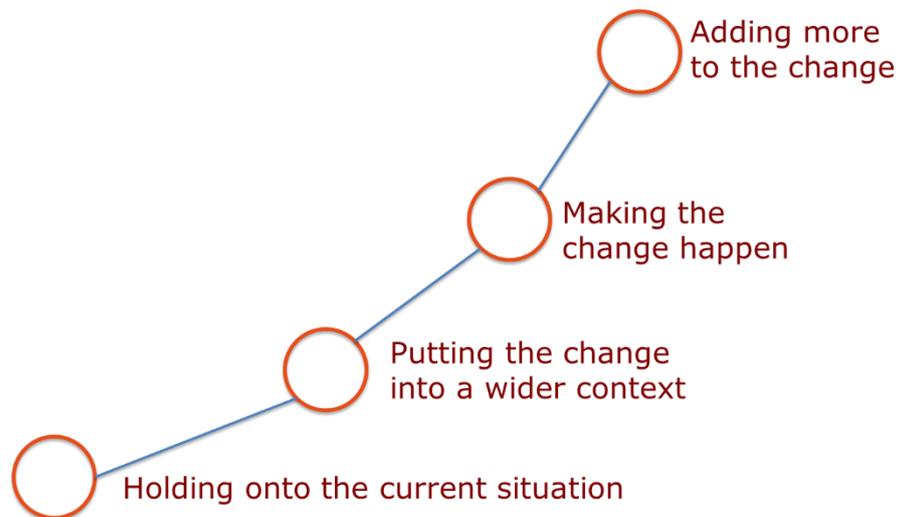
interested in the relative priority of the project work, needing to know where the project sits in relation to other initiatives, trying to gauge what they should treat as 'top priority'.

3.   **Get on and implement the deliverables** – people with this preference are 'doers'. They are motivated by how much work they have got done and how many tasks they have ticked off their to do list each day. When they get involved in implementing change, they look for a detailed task list of things that need to be done to move from old ways of working to new ways – e.g. redesigning processes, going on training courses, agreeing new performance metrics. They are unlikely to contribute many additions or want to change the list in any way. Their priority is to undertake the work and make the change a reality. This sounds great in theory, but in practice their limitation is that they will not contribute much information about possible risks or problems. They don't think about the wider implications or question the priority of the work so make sure that what you ask them to do has been properly thought through.

4.   **Opportunity to add their ideas to the change –** opportunity for design and creation of additional changes. People with this preference take their initial understanding of the changes required as a starting point. They want to contribute and as they are unafraid of change and see it as a positive thing to do, they want to go further and add more to the scope. Point them in the direction of other parts of the organisation that might be impacted by your project and they will make a great contribution by finding others who need to change and additional functions and processes that need to be amended.

Summary

Obviously these are just suggestions and I think excellent change management involves creating an environment that really welcomes the participation and involvement of our users and any contribution that our users feel able to make.

The difficulty we have to face is that this openness can make planning very difficult and it also cedes control away from the project manager to a group of volunteers who are not 'officially' members of the project team. My advice is 'get used to it!' Informal collaboration is the future of work. Research tells us that mandating team membership leads to less effective teams. Those teams that form voluntarily are the most effective so encourage link-ups and relationships to form between project team members and their users to share ideas and have open flows of communication.