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Change Management for Project Managers

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Overview

I delivered this speech at Project Challenge expo on 7th October 2015. The audience comprised expert project and change managers, business leaders and stakeholders and I have included comments from the audience in my conclusion. Should you wish to follow up on any of the ideas or conclusions then please contact me on melanie@agilechangemanagement.co.uk.

This document seeks to identify and describe change management activities that need to be added to project plans, to help ensure that projects don't just deliver but that they also realise the benefits associated with the deliverables.

Project management is evolving because the scope of projects is broadening. We are no longer responsible only for the creation of deliverables in response to the requirements of our users. It is now our responsibility to help users embed those deliverables into their ways of working so that their value can be fully exploited and all of the benefits promised in the original project business case can be realised.

Project Lifecycle	Change Lifecycle
<ul style="list-style-type: none">• Concept• Design• Develop• Test	<ul style="list-style-type: none">• Build awareness of what will be different• Create enthusiasm for participation in the project• Engage users in working with the project team• Help users to identify all activities needed to create new ways of working

Effectively the role of Project Manager is becoming part project and part change manager. Really smart project managers who are adapting well to this new scope realise that the project lifecycle does not stop with creation:

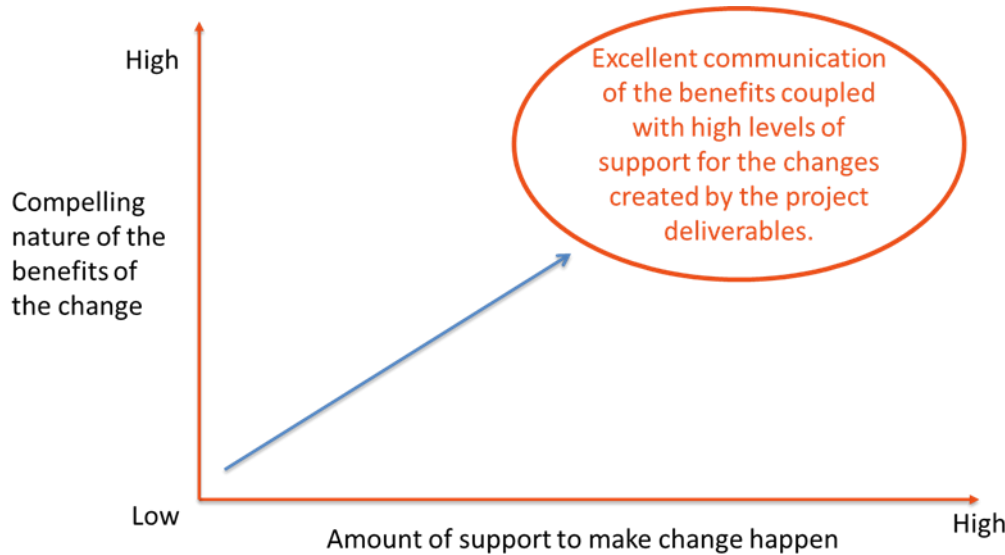
- There is a need to prove early in the project lifecycle that the project deliverables will lead to improvements, advantages and benefits.
- There is a need to expand the scope of the project plan to incorporate activities that support the creation, adoption and embedding of new ways of working and therefore the realisation of these benefits.
- There is a sense of urgency about these changes to project management, driven by the increasing use of [Agile Project Management](#) which triggers multiple deliveries throughout project lifecycle.
- Projects cannot stop at creation, relying on users 'getting on with it' and taking what the project creates and building new ways of working without support from the original creators.

This widening scope needs to be reflected in our project plans. After all, if we do not identify what needs to be done, we will not resource it, we will not allocate sufficient time to it and therefore, it will not get done.

The easiest way to appreciate the impact on project plans is to consider the quality criteria for an effective project plan. Let's consider two scenarios:

- The old world, where as a project manager I was measured against my ability to deliver all of the requirements specified by my users on time, on budget and to the required level of quality.
- The new world, where I am measured on my ability to create support for the changes being created by the project deliverables and the amount of benefits being realised as a result of the project.

In the new world, hitting the sweet spot of realising all the benefits promised in the business case alongside a community that is fully behind the need for the project means I have to include a lot more 'marketing' style activities into my project plan. I can no longer take responsibility for just creation. Now I am responsible for creation and promotion of the project deliverables.



To help me make this move, I have created a new set of acceptance criteria for effective project plans, which act as my checklist to ensure I have included all of these extra activities. The new world does not replace the old world. Instead I believe that the new acceptance criteria are a combination of both.

Old world – Creation of deliverables	New world – Adoption of deliverables
<ul style="list-style-type: none"> • Performance metrics track activities that lead to the creation of the project deliverables, measuring if the creation of each component of each deliverable as well as the final deliverables are on time and on budget. 	<ul style="list-style-type: none"> • New performance metrics are created to track the level of involvement and participation by users in helping to create new ways of working that include the project deliverables. Also, new metrics track the level of support for changes that the project is trying to create.
<ul style="list-style-type: none"> • Does the project plan including activities for training users in how the deliverables should be operated? 	<ul style="list-style-type: none"> • Does the project plan include the development of a shared understanding between users and project team members of how ways of working might be adapted?
<ul style="list-style-type: none"> • Does the plan allocate activities to project team members? 	<ul style="list-style-type: none"> • Does the plan allocate activities to a mixed group of users and project team members?
<ul style="list-style-type: none"> • Does the project plan include activities to test if the project deliverables work i.e. they meet acceptance criteria? 	<ul style="list-style-type: none"> • Does the project plan include activities to check is the users view the project deliverables as useful and desirable?
<ul style="list-style-type: none"> • Does the project plan include activities to communicate information about the project? 	<ul style="list-style-type: none"> • Does the project plan include activities for asking for feedback about the project deliverables from the users?

Participation and Enthusiasm

This means that we need to ensure on top of all of the 'creation' activities, our project plans also include two types of 'marketing' activities:

- Participation in the change
- Enthusiasm for the change

Participation in the change

This means mobilising all of those impacted by the project to:

- Become involved in identifying the most relevant and useful project deliverables
- Become involved in designing, planning and implementing changes to current ways of working

I don't think the top activity is anything different to what we do now. Great project managers have always worked collaboratively with their users. What I think is different now is that we need to widen our brief to encourage our users to prepare for the adoption of the project deliverables. We need to help them form task forces to rewrite their current procedures. We need to help them carry out impact assessments to work out which of their customers or which of their procedures is affected by the project.

Enthusiasm for the change

This means building awareness in the possibilities offered by the project and generating excitement and motivation about being a part of this new way of working:

- Belief in value of the proposed benefits
- Excitement about the proposed future state

It might look as if I am advocating a widening of the responsibility of the project team for actually delivering the benefits. I am not, but I don't think we should be naïve and assume that we live in a simplistic world where the creation of the deliverables is the responsibility of the project team and the realisation of the benefits is the users responsibility. We need to collaborate and the project manager and project team members actively engaged in development have an early insight into how the project deliverables can improve business processes so can be a great source of information about business value.

Levers for Change

Levers are actions involving a relatively small amount of effort, which can generate a disproportionately large impact. There are different types of levers that we can apply, each of which is achieved via a number of change activities. There is no simple strategy for increasing user participation in the project and emotional buy-in to what it is creating. Each of these examples will

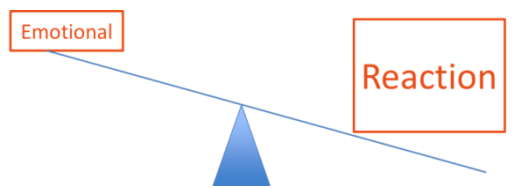
have some effect with some users so it is important to identify as many examples as possible and to include as many throughout your project plan as these levers need to be applied early and frequently.

Some of the most common levers are:

1. **Emotional** – actions which inspire an internal pressure to change. On the positive side they create the feeling of 'I want to be a part of that group' because involvement in the change appears as an attractive proposition. On the negative side, emotional levers can induce a feeling of guilt and anxiety about being left behind or not doing what is needed or expected.
2. **Procedural** – actions which are imposed by the process that must be followed. These levers do not rely on persuasion to encourage people to work in new ways. Instead they make the use of the new project deliverables integral to the way things are done by including this use as specific steps in the process.
3. **Structural** – rewards, punishments and responsibilities which create an external pressure to change. These levers create an organisational structure that expects/demands use of the new project deliverables as part of the role that someone performs and part of the metrics against which their performance is measured.
4. **Environmental** – physical and structural aspects of the working environment which encourage use of the project deliverables.

It is difficult to generalise because the levers relevant to your project will be a product of the type of change your project is generating and the culture of your organisation. Here are a few ideas to stimulate your own thoughts:

Emotional levers



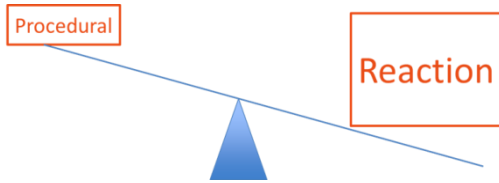
Generate pride in being associated with the project:

- Invitation only workshops where specially selected users are made to feel special and important and part of the 'in-crowd'.
- Early sight of project deliverables via demonstrations and walk-throughs to highlight that their views are of special importance to the project and their input is valued.
- Linking new ways of working with promotion prospects to generate a strong reason for getting involved in the project (this can also be part of a structural lever).
- Creating a club house for those users taking on additional project responsibilities to make them feel valued and important, and to create an identity for the group they are a part of.

Generate guilt about not being involved:

- Pointing out the negative impact to colleagues of delays in creating the new project deliverables and moving towards new ways of working. These delays might be a suppression of new business opportunities or the continuation of mistakes and the need for rework.
- Outlining the disadvantages experienced by customers in the current and demonstrating how use of the project deliverables will make engaging with your organisation easier/faster for your customers.

Procedural levels



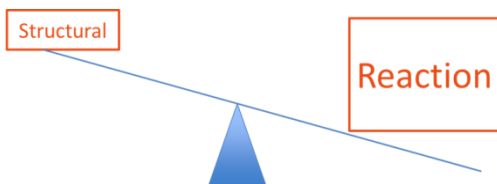
Add an extra question onto an agenda:

- ensures that a certain subject is automatically discussed as part of a meeting. For example, if you want users to discuss the progress of the project and their involvement in it, make sure a section on project progress is added into their existing process for team meetings.

Add use of the project deliverables:

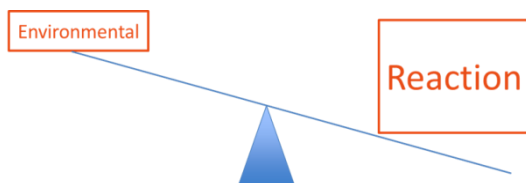
- Include them into the completion criteria for a specific task. For example, if you want to make sure information is added into a new system by a sales team after every sales meeting, ensure that this field becomes a mandatory part of the input process.

Structural levels



- Reward schemes for users giving up time to get involved in the project
- Public thanks from senior leaders
- Bonus schemes to share the additional value created by the project
- Explicit responsibility for the creation of new ways of working given to specific staff

Environmental levels



- Users working with the project team made to feel special so given special area to work in
- More mobile working so more chargers placed around the office
- More collaborative working so more 'meet up' spaces created in the office
- More visible progress so more white-boards put up around the office

Conclusion

The role of project managers is widening in scope whether we like it or not. As a result of this presentation I was asked by several audience members why the role of business change manager, often performed by someone already embedded in the business couldn't perform the activities I am outlining.

The obvious answer is that they can and they should – pulling the levers for change and creating new ways of working is their job. However, there are several considerations:

- There isn't always a business change manager role – we all work on projects where those affected are trying to grapple with preparing for the changes being brought about by our projects whilst continuing their business as usual roles
- Even if there is a business change manager role, we can work well together to help identify all of the activities needed to make the project a success. It makes sense that these are included in the project plan so that they are not ignored. Project success should be deliberate, not accidental.
- Finally, by using the project plan to house all of these persuasion and motivation tasks, we are creating a more honest picture of what is involved in successful projects. This can help sponsors and other stakeholders realise why things take as long as they take.