

Organizational Change Management

How Organizational Change Management relates to
Project Management

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Who is Katie?

- Hiker, backpacker (weekend warrior)
- Baby boy due August
- Middle child of 5 kids
- Married 15 years
- 2 cats



Group Agreements

- Listen for understanding, safe space
- Lean into discomfort, brave space
- W.A.I.T. – Why am I talking? Why aren't I talking?
- Maintain respectful engagement, be mindful, non-judgmental
- Have fun



Presentation Objectives

- How do Project Management and Organizational Change Management relate and integrate?
- Identify the benefits of integrating the disciplines.



Personal Change Assessment

1. Briefly describe a personal change in behavior you are trying to facilitate with a friend, family member, neighbor, or work associate.
2. List the reasons you believe this change is necessary.
3. List the factors or consequences (good and bad) for this person that create a *desire* to change.
4. List the skills and knowledge needed for the change, both during and after the transition.
5. Considering the skills and knowledge from question 4, evaluate the person's *ability* to perform or act in the new way. Are there any barriers inhibiting the person's *ability*?
6. List the *reinforcements* that will help to retain the change. Are incentives in place to help this person make the change stick? Are there incentives not to change?



What is Project Management?

- The process side of change
- Focuses on managing the project scope, schedule, budget, and resources to achieve the future state
- Focus on what, when, who, how much
- Activities
- Functions
- Content

PM Phases
Initiate
Plan/Design
Execute
Monitor and Control
Close



What is Organizational Change Management?

- The people side of change
- Focuses on adoption of a change to achieve the future state
- Focus on *why*, *who*, *where*, and *how*
- Head, heart, and hands
- Skills and ability

OCM Phases

Prepare for change

Plan and Design the change

Execute the change

Reinforce the Change





Obstacles Impacting Organizational Change

- Lack of executive support and active sponsorship
- Poor Planning
- Lack of skills
- Fear of the impact/losing control
- Lack of communication
- Insufficient resources
- Lack of buy-in (the why)
- Change-resistant culture and attitude

Comparing OCM and PM

Focus:
Technical side of moving from current state to future state



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

- Process:
- Initiation
 - Planning
 - Executing
 - Monitoring/Controlling
 - Closing

- Tools:
- Statement of Work
 - Project Charter
 - Business Case
 - Work Breakdown Structure
 - Budget Estimations
 - Resource Allocation
 - Schedule

- Process:
- Organizational:
- Preparing for Change
 - Planning for Change
 - Executing the Change
 - Reinforcing the Change
- Individual:
- ADKAR

- Tools:
- Individual Change Model
 - Readiness Assessment
 - Communication Plan
 - Sponsor Roadmaps
 - Coaching Plans
 - Training Plans
 - Resistance Management
 - Reinforcement



Why are PM/OCM insufficient alone?

PM without OCM

- Focus on deliverables and installation
- Focuses on events and timelines aimed to get from a current state to a future state
- Lack of change readiness
- Insufficient resistance mitigation
- Insufficient stability during change

OCM without PM

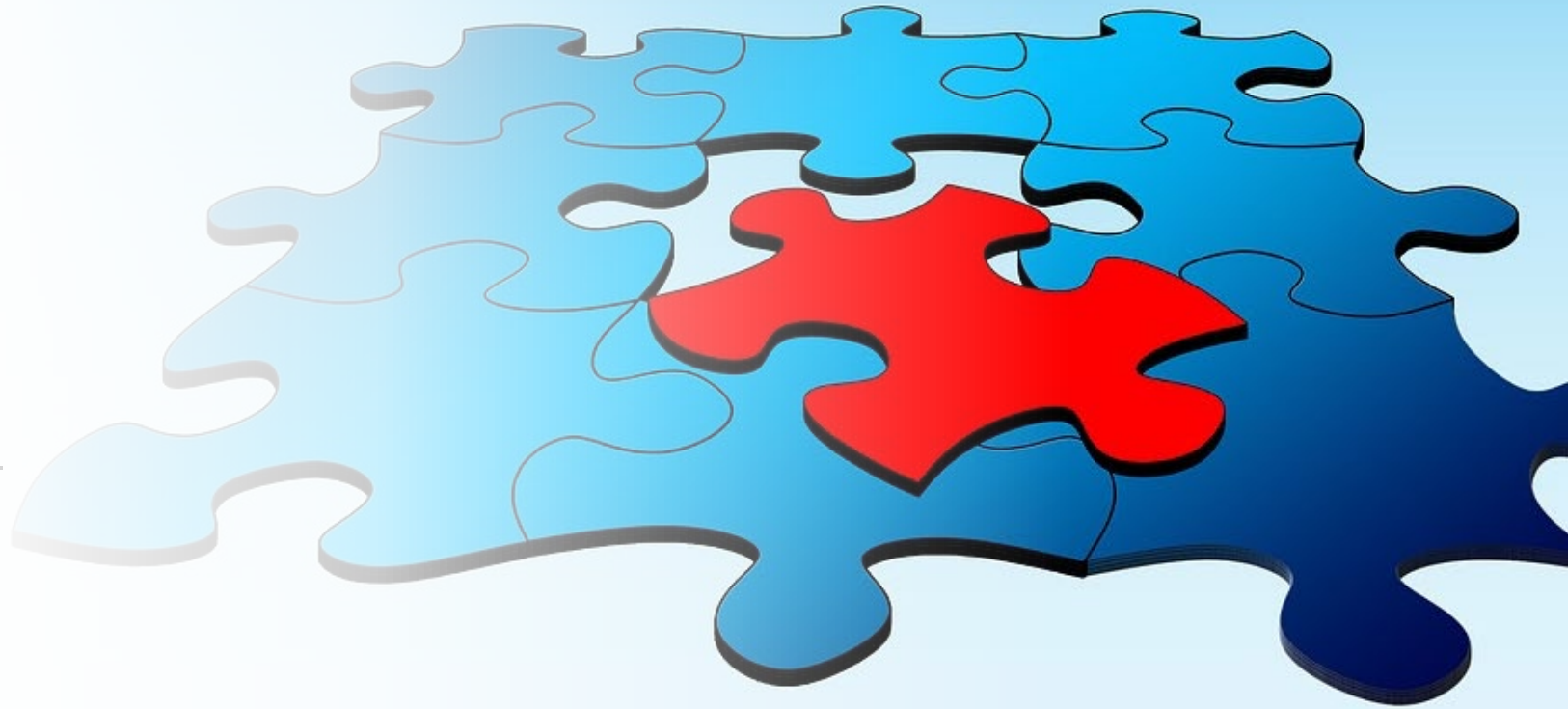
- Focus on adoption
- Focuses on the people aiming for mass commitment to the change, learn new behaviors, and sustain them willingly
- Less PM Triangle focus
- Lack of PM rigor
- Lack of consistent documentation
- Lack of governance





Benefits of Integration

<https://vimeo.com/376708874>



Benefits in Leadership

Project Management

- Codifies sponsors' roles and responsibilities
- Establishes framework for their engagement
- Informs on progress and engages in decision-making

Organizational Change Management

- Prepares sponsors for their role in the change process
- Provides content for their activities and interactions
- Checks “bad” behavior



Benefits in Communication

Project Management

- Emphasized the “facts” – who, what, when, and how
- Addresses action, deliverables, and outcomes
- Provides conduit for information sharing

Organizational Change Management

- Emphasizes the “why” and the “personal”
- Addresses and elicits/encourages behaviors
- Provides conduit for participation in change



Integrated Communications

Milestone	Project Message	Audience	Objectives	Change Message	Audience	Objectives
Initiation	Announce project, including objectives	Interested Parties	Set Expectations	What is changing, why & risk of not changing	Impacted people	Awareness
	Announce team, budget, scope	Team, Sponsors	Harness Resources	Announce CM team	Impacted people, team, sponsors	Governance
	Comms protocols within team	Team	Governance	Announce Sponsor Coalition	Impacted people	Structure



Benefits in Interested Parties Management

Project Management

- Assesses power relationships
- Documents engagement strategies
- Plans and manages risk

Organizational Change Management

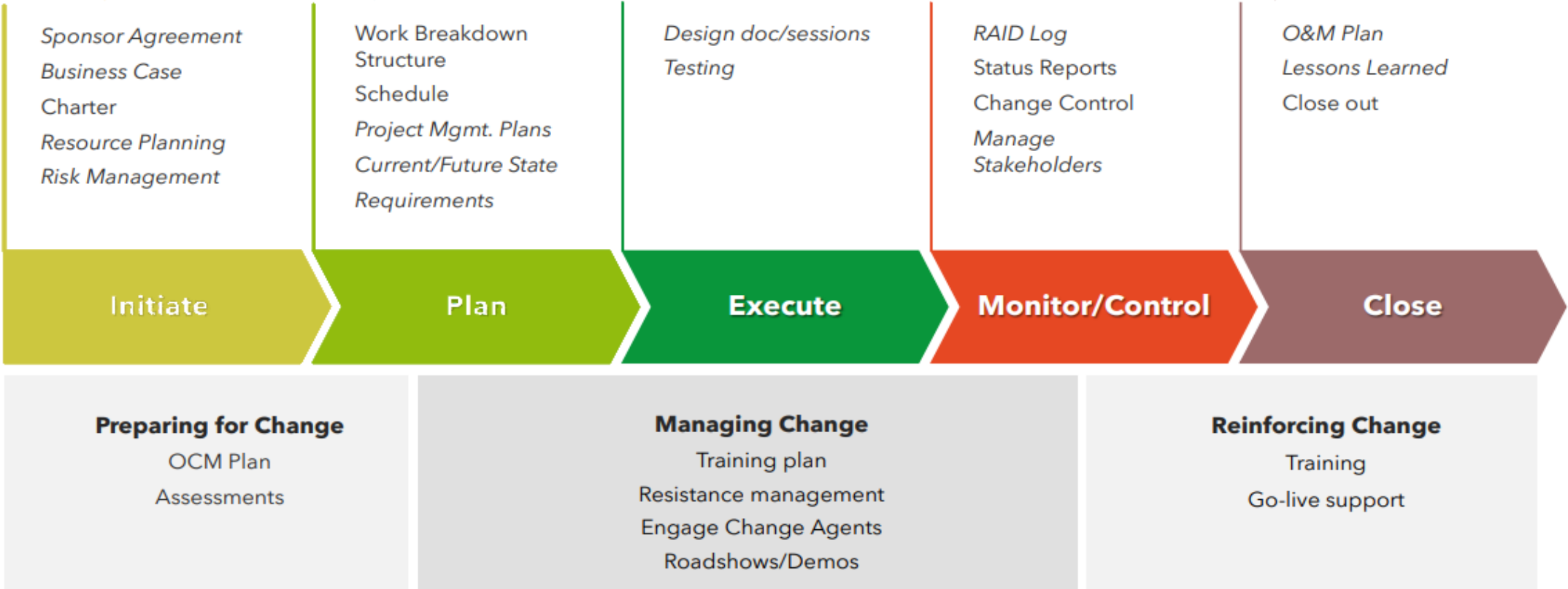
- Engages the WHOLE organization
- Checks for bad behavior
- Combats resistance



Integrated Lifecycles and Deliverables

Organizational Change Management provides the people substance.

Project Management provides the technical substance



Consequences of Not Managing Change

- Project delays
- Rework required on design
- “Us” and “Them”
- Resistance
- Reduction in productivity
- Decrease in morale
- Turnover
- Project fails to deliver results



A Simple Introduction to OCM Methodology



Prosci's ADKAR Model

- **A** – Awareness
- **D** – Desire
- **K** – Knowledge
- **A** – Ability
- **R** – Reinforcement

ADKAR Survey



Barrier Point

Personal Change Assessment Scores



What we covered today?

Did we meet our objectives?

Objectives:

- How do Project Management and Organizational Change Management relate and integrate?
- Identify the benefits of integrating the disciplines.

What we Covered:

- Relation, differences, and integration of Project Management and Organizational Change Management
- Benefits of integration
- Risks of not managing change and challenges to managing change
- Introduction to Organizational Change Management





Questions?

References

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