

2011 ACMP GLOBAL CONFERENCE

BUILDING COMPETENCIES FOR INTEGRATING CHANGE MANAGEMENT AND PROJECT MANAGEMENT

May 1, 2011

Pre-conference Workshop

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WORKSHOP OUTLINE

- I. Introductions
- II. Workshop Objectives
- III. Definition, Concepts, and Trends with PM & CM
- IV. Compare and Contrast with PM & CM
- V. How to improve / integrate PM & CM
 - Know where you are today: maturity level (e.g. CMM L1-5)
 - Establish a target
 - Define roadmaps: methodology, processes, tools, roles,
 - What about Agile?
- VI. Additional related disciplines
 - IT governance, business transformation, business strategy, PPM, financials management,



YOUR FACILITATORS

Joe Rafter

- Implemented business & technology transformation solutions across global product management, operations, and technology teams.
- Adept at aligning business and technology partners to plan and prioritize business initiatives.
- Strategic thinker with an operational mindset having demonstrated experience with building high performing teams that create positive business impacts.
- Skilled in turning around complex organizational challenges across internal and 3rd party teams.
- A business-technology hybrid executive who enhances corporate presence through public speaking and thought leadership.

Bill Synnot

- Leading change management practitioner, trainer & consultant
- Over 30+ of experience in change management and as a change catalyst
- Worked with 500+ world-wide organisations in range of sectors (private, public, local, co-operative, professional, not-for-profit, etc)
- Published book, CD and articles on change management
- Regularly presents at conferences on change management
- For 10+ years has conducted public and in-house Masterclasses/workshops on change management



WORKSHOP OBJECTIVES

- **Definition & Concepts:** *Change Management is More of an Art and Less of a Science than Project Management*
- **Commonality/Differences:** *How Change Management Supports Contemporary Project Management*
- **Competencies:** *Change Management is a Core Competency in Project Management*
- **Agile:** *Integrating Agile Concepts within Enterprise Change Management*
- **Network:** *We Learn by Sharing Experiences with Each Other*



Integrating Change & Project Management

Definition, Concepts, & Trends



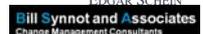
CONCEPT - CHANGE MANAGEMENT

- Doing some thing differently or new
- It is about a **human journey** around behavior such as changing mindsets, beliefs, etc.
- Need to be willing to be challenged and to feel insecure.



"...we basically do not know what the world of tomorrow will really be like, except that it will be different, more complex, more fast-paced and more culturally diverse..."

EDGAR SCHAEN



CONCEPT - CHANGE MANAGEMENT



- *“Change management is a structured approach to shifting/transitioning individuals, teams, and organizations from a current state to a desired future state.”*

How do YOU define change management?



TRENDS IN CHANGE MANAGEMENT

- Recent failure of traditional frameworks has increased focus on understanding of



- evolutionary physiology
 - non-rational thinking in decision-making, etc.
 - collective behaviour, eg social networks
 - chaos theory
 - complexity
- Change is very circumstantial



MORE TRENDS IN CHANGE MANAGEMENT

- Empowering/engaging people
- Neuroscience focus, ie understanding how the brain works
- Change Management as part of Project Management
- Change Management in job titles/descriptions
- General shift in change practitioner, ie younger and more academically qualified



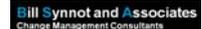
CONCEPT – PROJECT MANAGEMENT

- The traditional project management role is to manage the scope, cost & schedule of a temporary initiative that has a defined start and end date.

“Fast – cheap – good, you can pick two.”
-Anonymous



- Many formal methods have matured in the past 40 years, particularly in the software development industry including PMI, Prince2, and Agile as examples.



CONCEPT – PROJECT MANAGEMENT

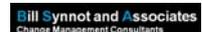
- Project Managers addresses many topics including:
 - Stakeholder Management
 - Scope Management
 - Schedule Management
 - Financial Management
 - Risk Management
 - Resource Management

Most Project Management techniques differ in how they address these topics, but they all address them in one way or another.



A QUICK WORD ON AGILE

- Traditional Project Management - Scope is fixed so time and cost are variable
- Agile Project Management – Time is fixed so scope and cost are variable.
 - ✓ Individuals and interactions over processes and tools
 - ✓ Working software over comprehensive documentation
 - ✓ Customer collaboration over contract negotiation
 - ✓ Responding to change over following a plan



CONCEPT – PROJECT MANAGEMENT

- *“Project management is the discipline of planning, organizing, securing and managing resources to bring about the successful completion of specific project goals and objectives.”*



How do YOU define Project Management?



TRENDS IN PROJECT MANAGEMENT

- The maturity of publicly available methodologies has given rise to the maturity of project management as a discipline.
 - PMI, Prince2, Agile
- An increasingly complex set of project requirements has forced companies to increase their demand for projects. Globalization of our economies
 - Globalization of our communication
 - Increasing pace of change from technical capabilities
 - Innovation driven competition to the point of innovate or die drives new products & services as well as squeezes cost out of existing operations.
 - Environmental sustainability in the form of eco-friendly / green initiatives



MORE TRENDS IN PROJECT MANAGEMENT

- To deal with this increasing complexity, companies have been forced to develop new project management supporting tools and techniques:
 - Strategy Alignment via Enterprise Project & Portfolio Management
 - Stakeholder Collaboration via Surveys, File Sharing, & Messaging (video & text)
 - Relationship Alignment via Client Satisfaction Measurement
 - Project Cost Allocations via Time & Expense Tracking
 - Enabling Change via Agile Methods like Daily Scrums, Burn Down Charts, Feature Backlogs



Integrating Change & Project Management

Compare & Contrast



CHANGE & PROJECT MANAGEMENT SHARE MANY CONCEPTS



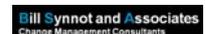
INTEGRATING CHANGE MANAGEMENT & PROJECT MANAGEMENT

- Why are people skills essential to Project Managers?

“The skills required for project management are now often divided 50/50 into traditional ‘hard’ skills, such as risk management and scheduling, and ‘soft’, people oriented skills, such as interpersonal communication.”

Sampson

Because Project Managers rely on People!



PEOPLE SKILLS (BEHAVOURAL)

Some people skills include

- **Communications** (listening, body language, electronic, traditional, etc)
- **Leadership** (delegation, flexibility, accountability, facilitation, positive attitude, influencing, self-confidence, passion, etc)
- **Trustworthiness** (honesty, integrity, etc)
- **Emotional Intelligence** (self-awareness, self-regulation, motivation, empathy & social skills)
- **Coaching/mentoring**
- **Stress management** (conflict resolution, etc)
- **Relationship building** (networking, inter-personal skills, stakeholder management, team management, etc)
- **Learning & development** (life-long learning, etc)
- **Marketing** (negotiation, selling skills, promotion, etc)



UNSCIENTIFIC "FIELD" RESEARCH

- Over the past ~30 days, we have conducted some unscientific field research using the global professional networking site, LinkedIn. [LinkedIn](#)
- We engaged 4 different groups within LinkedIn:
 - CIO Network,
 - Change Consulting,
 - The Project Management Network, and
 - IT Transformation



WE POSED A QUESTION:

- How do you view the disciplines of change management and project management? Complimentary, Redundant, or Conflicting? Can you describe why in 30 words or less?

Group	Group Description	# of Comments	Days of Research
CIO NETWORK	A collection of CIOs and executive IT leaders.	45	30
Change Consulting	A collection of change management practitioners	7	30
PROJECT MANAGERS	A collection of project management practitioners	2	30
IT Transformation	A multi-disciplined collection of practitioners focused on IT transformation.	13	9



IT WAS COMMONLY AGREED THAT...

- ...project and change management are complimentary to each other, often overlapping in their roles & responsibilities.
- ...the combination of project and change management provides greater value when they work in unison.
- ...in more complex situations, it becomes more important to have them work together, thus they have a shared path to success.



SUMMARY OF LEARNING

The Customer View

- The customers of project and change management demonstrated greater interest in discussing this topic than the practitioners.
- The customers focused their answers on their positive experiences when PM & CM work together.

The Practitioner View

- The practitioners tended to provide deeper clarity into how, when, and why these disciplines are complimentary.
- Change Management is not uniformly defined. In some cases the difference between business change, project change, and technical change was identified and the responses were different.



SOME INTERESTING QUOTES

- They are kissing cousins.
- Like the alphabet: C comes before P, so CM must be established and then PM can begin their activities. Never forget this rule!!!
- It is complimentary and in many cases we can relate it to Chinese Yin & Yang, the interaction of these two objects cause everything to happen in any project environment.
- All change involves project management, but not all projects are equal. Change managers must select an appropriate project management process.
- Intricately linked.



SOME MORE INTERESTING QUOTES

- The very nature of project management must incorporate change management elements. Change management similarly must consider project management principles in its implementation.
- 2 sides of the same coin, If you only have 1, you have a counterfeit.
- Change management, while used in Project Management, is a "tool" or process that I view as having a quasi-symbiotic relationship with PM.
- The bigger scope the project is, the more critical to have the change management or governance function to control the quality and risk, and inspire the open-minded culture.



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HOW CAN WE LEVERAGE THIS LEARNING?

- Within your environments, ensure that you have clear and simple answers to the following questions:
 - Who is your most important "customer" of change and project management?
 - When / how do you engage project management in your activities?
 - When / how do you engage change management in your activities?
 - How are you integrating project and change management to maximize the opportunity for change?



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COMMONALITIES IN CM AND PM

- Most Change and Project Management assignments **do not** achieve all their objectives, eg do not deliver desired outcomes on time and within budgets, etc
- Importance of ownership by implementers
- Understanding situational and contextual matters (circumstances vary with each project)
- Understanding different stakeholders' needs & expectations (these can change over time)
- Understanding different cultures (organizational, projects, stakeholders, etc) and their interfaces
- Performance focus



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DIFFERENCES BETWEEN CM AND PM

- | Change Management | Project Management |
|---|---|
| • Focus on people (behaviors/mindsets/values/beliefs/emotions) | • Focus on delivering products/services (outcomes/outputs) |
| • Focus on impact of products/services delivered | • Focus on definitive frameworks & processes |
| • More flexibility & less formal approach to frameworks/processes/schedules | • Has well defined schedule, such as start, middle & end |
| • On-going (not an event) | • Background of practitioners (focus on "hard"/tangible/technical skills, eg engineering) |
| • Background of practitioners (focus on "soft"/intangible skills, eg HR) | • Manage things (IQ) |
| • Manage people (EQ) | • More of a science and less of an art |
| • More of an art and less of a science | |



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(DIFFERENCES BETWEEN CM AND PM CONT.)

In Summary

- *Change management needs to be integrated at the start of the project, **not** be an add-on to project management when convenient.*
- *Too often focus is on technical problems/solutions first. Only when people problems, like resistance, arise is change management considered*
- *Project management has been described as preparing and cooking the BBQ while Change Management is more about looking after the guests*



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ACTIVE INERTIA AND STATUS QUO THINKING

Need to be careful that project management does not become an example of active inertia and status quo thinking. This leads to complacency & makes change management very hard!!!



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RESISTANCE TO CHANGE

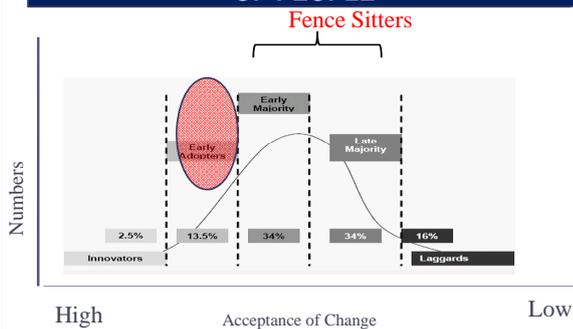
- It is normal
- People are concerned about loss (real & perceived)
- Need to understand what is under-pinning the resistance
- Minimise time in this area by focusing most attention on supporters of the change

NB We are creatures of habit and prefer our zones of comfort !!!!!!!

C.A.V.E.

(Citizens Against Virtually Everything)

RATE OF ADOPTION OF CHANGE BY TYPE OF PEOPLE



TEAMS – SOME KEY QUESTIONS

- Does your compensation/reward/recognition system reflect the team's performance?
- What attitudes do members have?
 - ie - "us and ours", not "mine, yours, etc"
 - respect for each other
- Are individuals willing to take "a knock" so that the whole team can benefit?
- Do the team members have a clear, shared objective?
- What is the size of team (ideal under 10)?

IMPROVING COMPETENCIES (BACKGROUND)

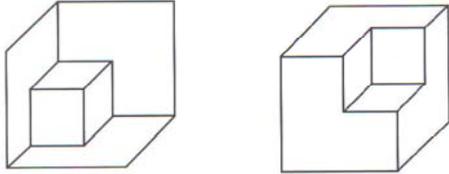
- The world is seen through many eyes, not just your own, ie people's perceptions become their reality
- Remember: facts do not change but people's perceptions of them do
- People's perceptions are based on their background, culture, values, experience, self-interest, pride, ego, ambition, etc
- Decision-making is not always logical and rational but is based on emotions, prejudices, biases, etc

(BACKGROUND TO IMPROVING COMPETENCIES CONT.)

Definition of Insanity

Need for Circuit Breakers to Encourage Change & Different Thinking

SEEING THINGS DIFFERENTLY



MINDSET CHANGES

1. Writing in space
2. Bulgarian bulldozers
3. Railways and optic fibres
4. Post it notes
5. Shoes in Africa
6. Nelson Mandela
7. No game, more pain
8. Houdini's lucky escape
9. Four-minute mile

OBJECTIVE OF THESE IMPLEMENTATION TECHNIQUES

To build your (and your organisation's) competencies, capacity and capability to handle change more effectively and have successful project(s)

HOW TO ACHIEVE THE OBJECTIVES OF THESE IMPLEMENTATION TECHNIQUES

- Ask the "right" questions so that you have the "right in-depth" dialogues/conversations/discussions, etc
- Focus on causes, not just symptoms
- Motivate the "right" stakeholders to achieve ownership of the challenges and then the solutions
- Develop the "right" relationships

(HOW TO ACHIEVE THE OBJECTIVES OF THESE TECHNIQUES CONT.)

- Press the "right" buttons to get people on side, ie WIIFM
- Encourage "mental arm wrestling" or "creative tension" to get more effective outcomes
- Understand yourself and others, ie strengths and weaknesses, in order to get the best out of everyone

NB Ideally do it in a non-threatening environment so that people feel free to challenge the status quo

WHAT MOTIVATES PEOPLE?

➤ Watch out for Fear and Coercion

(this results in people "freezing", and is illustrated by

- compliant behavior
- learned helplessness
- blame culture, etc.)



➤ Competitive spirit, ie healthy competition

(WHAT MOTIVATES PEOPLE CONT.)

- Desire for greatness, ie want to be the best
- Doing the right thing, ie focus on good nature of people
- Personal gain, ie linked with personal development
- Making a difference, ie combination of above



HOW TO PERSUADE PEOPLE

- Reciprocate, ie repay favour
- Be consistent, ie keep previous commitments
- Validate others socially, ie acknowledge others are already involved
- Personal acceptance, ie prefer to deal with those you like
- Acknowledge authority, ie experience & expertise
- Understand scarcity, ie more desirable if less available



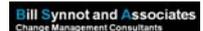
SOME CHANGE IMPLEMENTATION TECHNIQUES USEFUL IN PROJECTS

- Discussability of Issues
- Critical Reflection (Individual & Group)
- Assessing Change Management Skills
- Non-verbal Signals
- Understanding Culture
- Some Questions on Culture
- Understanding Oneself
- Supportive Listening



(SOME CHANGE IMPLEMENTATION TECHNIQUES CONT.)

- Story Telling
- Driving Forces Analysis
- Network Mapping
- Scenario Planning
- Analyse the Way you Spend your Time
- Creative thinking (6 hats)
- Resistance (Grief cycle), etc



CROSSWORD

(ACTIVITY TO ENCOURAGE DIVERGENT THINKING)

CLUES: ACROSS

1. a vegetable
2. female sheep
3. laying eggs
4. ocean
5. for dropping

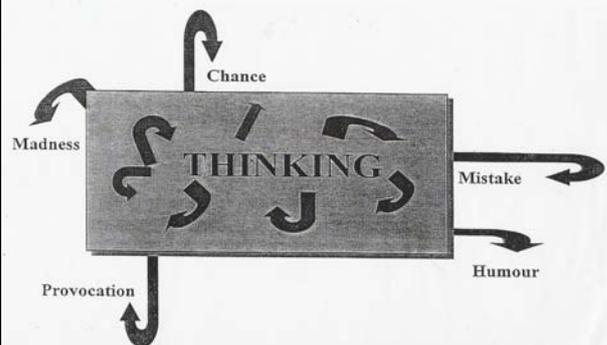
DOWN

1. a blow or hit
2. Judy's friend
3. for making holes
4. a party drink

	1	2	3	4
1				
2				
3				
4				
5				



THINKING OUTSIDE THE BOX



BASIC GUIDELINES OF BRAINSTORMING

1. Criticism is actively discouraged
2. Piggybacking off ideas of others
3. Record ideas without censorship
4. Quantity is more important than quality of ideas
5. People listen to ideas of others
6. No personal attacks allowed

(BASIC GUIDELINES OF BRAINSTORMING CONT.)

7. Encourage outrageous, ridiculous ideas
8. Look for positives before negatives in the ideas
9. Treat everyone with respect
10. Emotions allowed to occur
11. Constant interruptions are allowed

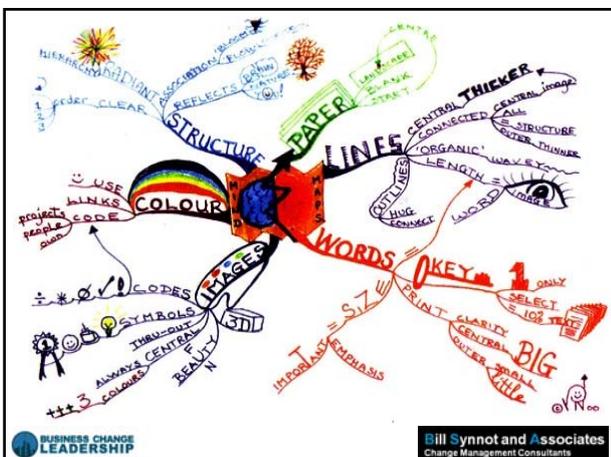
CREATIVE THINKING

The 6 hats that help structure a meeting so that it is more productive

1. **White** (information gathering)
2. **Red** (emotion, feelings, intuition, gut feeling)
3. **Green** (creative thinking)
4. **Black** (critical appraisal)
5. **Yellow** (benefits, advantages, good points)
6. **Blue** (overview, summary)

MIND MAPPING

Guidelines for Mind Mapping



REASONS FOR NOT GIVING A DOG TO A 5-YEAR OLD



ACTION PLAN

- What?
- How?
- Who?
- When?

Prioritise !



INTEGRATING IT GOVERNANCE & AGILE CONCEPTS

Enterprise IT Governance

Are We Doing the Right Things?

Are We Doing Things Right?

Are We Delivering Value to the Business?

Programs / Projects

Scope

Cost

Schedule

Sprints

Backlogs

Features

Releases



THE TRAIN ANALOGY

Much like a train station has a set schedule with trains that contain a certain number of cars departing with a limited # of seats...



...an enterprise has an annual budget with programs / projects that contain a certain number of sprints to deliver a limited # of features.

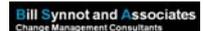


AND WHEN THINGS CHANGE...

- New trains and destinations can be added to the schedule
- Decisions on which passengers get on the train happen real-time



- New programs / projects can be added to the enterprise portfolio
- Decisions on which features go into which sprints happen real-time



AND ALL ALONG...

- The train conductor and train operator are held accountable for a set of KPIs



- The program / project sponsor and the executive governance team are held accountable for a set of KPIs.



PUTTING AGILE INTO ACTION

A Closed Loop Process

- Fiscal Budgets approved
- Programs / Projects approved using business cases with KPIs
- Executive sponsors held accountable for the budget / KPIs
- Change is planned, delivered, and measured on a monthly basis
- Reconcile the budgets and KPIs

SCRUMS

Org Level	Frequency
CxO	Quarterly / Monthly
Exec. Governance	Monthly
Program	Monthly / Bi-weekly
Project	Weekly
Sprint	Daily



SUMMARY

- Concepts
- Commonality/Differences
- Competencies
- Agile
- Network



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