Integrating Organizational Change Management and Project Management

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THE UNIVERSITY OF KANSAS
OFFICE OF INFORMATION TECHNOLOGY
Organizational Change Management – What’s the Big Deal?

• IT is tired of getting blamed for projects that fail
  – Did we miss requirements? end user expectations?
  – Why did end users rebel or refuse to use whatever the project created?

• Failure is expensive
  – Measurable $$ cost
  – Lingering resentment by faculty and staff

• We should be smarter than we were 20 years ago
  – Neuroscientists have been studying what helps people change successfully
  – Why the heck don’t we pay attention to the research?!
**Organizational Change Management**

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

- **Process**
  - Organizational:
    - Preparing for change
    - Managing change
    - Reinforcing change™
  - Individual:
    - ADKAR®

- **Tools**
  - Individual change model
  - Readiness assessment
  - Communications plan
  - Sponsor Roadmap
  - Coaching plan
  - Resistance management
  - Training plan
  - Reinforcement

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**Project Management**

**Focus: The Technical/Process side of moving from the current state to the future state**

- **Process**
  - Initiating
  - Planning
  - Executing
  - Monitoring and Controlling
  - Closing

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

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2019 Prosci Library of Figures
Let’s Define Them – and Get Specific

Organizational Change Management
• It’s about how the *individual* wants, or doesn’t want to accept what the project has created

Project Management
• It’s about following the process to *create a set of deliverables*

And here’s why it’s a big deal…

*the individual* decides whether or not they are going to use what was created

Prosci
Distinct Work with Distinct Resources

**Organizational Change Management**
- OCM Manager
- OCM Workstream Lead
  - OCM
  - Communications & Branding
  - Training
  - Go Live Support

**Project Management**
- Project Manager, Project Coordinator
- Project Workstream Lead
  - PM, Scrum Lead
  - Requirements
  - Testing
  - Go Live Support
### Where to Focus?

<table>
<thead>
<tr>
<th>Organizational Change Management –</th>
<th>Project Management –</th>
</tr>
</thead>
<tbody>
<tr>
<td>Employees that are impacted by a project or initiative</td>
<td>• Tasks and activities required to create and implement the technical solution associated with a change</td>
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<tr>
<td>Focus on executives/senior leaders and managers/supervisors</td>
<td>• Focus on project managers and the project team</td>
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<td>Success focuses on the people side of change elements</td>
<td>• Success focuses on the technical side of change elements</td>
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The A&M System’s PM Approach

INITIATING → PLANNING → EXECUTING → CLOSING

The Texas A&M University System TAC 216 Companion Guide
Initiating

**Your Goal**

- Introduce formal OCM principles and activities to the project manager, the project team, the sponsor and key stakeholders

- Begin to show the impact OCM can have on project success and adoption

**The Focus**

- Sponsors, Sponsors, Sponsors

- What does a successful project look like *from the end user’s perspective*?

- How big and complex is the change?

- Who is impacted by the change?
Planning

Your Goal

• Get your plans in place
  – Sponsor
  – Communications
  – Coaching
  – Resistance Management
  – Training

The Focus

• Sponsors, Sponsors, Sponsors

• Change impacts drive EVERYTHING
  – How will you find and verify them?
  – Who (really) is impacted?
  – How does an end user’s job change?
Executing

Your Goal

• Do the work
• LISTEN, LISTEN, LISTEN
• Adjust the work based on what stakeholders tell you

The Focus

• Sponsors
• Communications
• Coaching
• Resistance Management
• Training
• Post Go Live Support
Closing

Your Goal

- Measure what happened (and what didn’t happen)
- Don’t stop too soon!
  - You need to be listening for 3 to 6 to 9 months after go live

The Focus

- Lessons learned
Next Steps for Implementing Change Management

**February 2020:**
- Develop General Timeline for implementing CM as a service

**March 2020:**
- Communicate with Change Management Teams at Other Universities
- Create KU EPMO Change Management Deliverable Templates (Assessments, Plans, etc.)
- Start KU Change Management Initiatives
  - Travel Request Compliance Workgroup

**April/May 2020:**
- Begin looking into training at Prosci for EPMO team
- Continue to Market Change Management to Campus

**June 2020:**
- Partner with HR on Development of Change Management Training on Campus
- Continue to Market Change Management to Campus

**July 2020:**
- July 8 – 10: Attend NCCI Conference in Atlanta, GA
The Benefit for KU

Increase Success of Initiatives

Employee Retention

Build a Culture of Positive Change for the Future

Overall Financial Savings for the University
And If You Can Only Do FIVE Things...

- Change success measures
  - These keep you centered and help you prove that OCM was worth the time

- Sponsors
  - We know the science of leadership and messaging so use them!

- Change Impacts
  - They drive EVERYTHING

- Stakeholders
  - YOU are their advocate

- Communications
  - All levels of the organization, strategic and tactical messages, and have fun where you can
For More Information

• Prosci
  – Change Management and Agile Report

• PMI
  – Integrated Change Management

• Any neuroscience research focused on how people change

• The Texas A&M University System TAC 216 Companion Guide

• KU Enterprise Project Management Office