TAC 216 Companion Guide

IT Project Management Best Practices

The Texas A&M University System

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DRAFT Appendix F – Integrating Organizational Change Management and Project Management
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Appendix F – Integrating Organizational Change Management and Project Management

Organizational change management (OCM) emphasizes the “people side” of the change triggered by the results of a project. When OCM is done well, stakeholders feel engaged in the change process, work collectively towards a common objective and are able to fully realize the benefits that come with whatever was created by the project. When OCM is not done, or not done well, it leads to failed projects and lingering stakeholder resentment which will impact future projects.

Although each institution and agency has its own culture and values, every project needs to address how a project impacts the stakeholders who have to do something differently as a result of the project. This means that a new position is needed on your project team, and that is someone who will act as an advocate for the stakeholder.

This appendix outlines OCM activities that should be considered for your project and organizes them by the Companion Guide project management processes. References to Prosci eToolkit tools and templates are included with the activity they support.

Which Project is a Good OCM Project?

If faculty, staff, student workers or retirees have to do something differently because of what your project produces, you have a good OCM project.

Start Small

A good place to start is with a lower risk project that has a sponsor who is willing to work differently. Successful OCM efforts ask the sponsor to take responsibility for OCM activities in addition to project management activities. The activities in this section represent the minimum OCM activities you should execute.

Initiating

- Draft three OCM project success measures/criteria with the project sponsor and project manager.
- Quantify and qualify the size and nature of the change.
  - Draft a list of the stakeholder groups.
    - Prosci eToolkit: Impact Index: ADKAR Analyzer
  - Make a high level pass through the change impacts.
    - Prosci eToolkit: Impact Index: Identifying Impact by Group, Change Characteristics Assessment
• Work with the project manager to decide how to manage the OCM team and OCM project plan.
• Document OCM risk and either add it to the project risk register or keep it in a separate OCM risk register.
  o *Prosci eToolkit: Sponsor Risk Grid Customizations and all other Risk Assessment and Risk Grid Customization tools*
  o *TAC 216 Risk Register*

**Planning**

• Finalize OCM project success measures/criteria with the project sponsor and project manager.
• Build all five OCM plans and include at least one activity in each plan.
  o **Communications**
    • Build a communications plan.
      • *Prosci eToolkit: Communications Plan Worksheet, Communications Key Messages*
      • *TAC 216 Communications Plan*
  o **Sponsor Roadmap**
    • Coach your sponsors on how they impact project success and adoption.
  o **Coaching**
  o **Resistance Management**
    • Think about where people will struggle and resist the change.
      • *Prosci eToolkit: Resistance Management Plan Template, Resistance Assessment Worksheet*
    • Build a change network and cascading change organization.
      • Decide how the network will support change adoption.
      • Determine their roles and responsibilities, meeting timeline and similar.
  o **Training**
    • If possible, work with local training resources to help you choose training channels and decide the most effective ways to deliver training in your culture and environment.
    • Develop a strategy to build and reinforce stakeholder skills and deliver training.
    • Decide how stakeholders will get help after go live.
• Continue to quantify and qualify the size and nature of the change.
  o Update the scope and nature of the change.
  o Finalize the list of stakeholder groups and finalize the scope of the impact to each stakeholder group.
    • *Prosci eToolkit: Impact Index: ADKAR Analyzer, Identifying Impact by Group and separate Excel listing change impact details*
• Start making presentations across your organization. Start with leadership groups during Planning.
  o Talk about the importance of OCM for project adoption and what leaders will be asked to do to support their faculty, staff, student workers and retirees through the change.
Emphasize that those impacted by change want to hear the strategic reasons behind the initiative from their leaders, and they want to hear about how the change specifically affects them from their direct supervisor.

**Executing**

- Execute your OCM plans.
  - Keep communicating!
- Start surveying and listening for feedback; adjust the other OCM plans based on what you learn.
  - Prosci eToolkit: Listening to Employees and Gathering Feedback, Employee Feedback Worksheet, Resistance Assessment Worksheet
- Fully document the change impacts.
  - Finalize the ADKAR Assessment and list of stakeholder groups.
  - Finalize the change impacts by stakeholder group.
    - Prosci eToolkit: Change Impacts by Group (on the Impact Assessment)
  - Build a separate Excel workbook detailing change impacts by category.
- Execute the Training Plan.
  - Define the training requirements from the change impacts.
    - Prosci eToolkit: Training Requirements Template, separate Excel with Change Impacts by Stakeholder
  - Build, deliver and assess training materials and training experiences.

**Closing**

- Build an OCM lessons learned package for your project sponsors.
- Assess achievement of success measures/criteria.
OCM and Initiating

During Initiating, introduce formal OCM principles and activities to the project manager, the project team, the sponsor and key stakeholders, and begin to show the impact OCM can have on project success and adoption.

Organizational Change Initiating Activities

- Draft OCM project success measures/criteria with the project sponsor and project manager.

- Prepare your sponsors for OCM success.
  - Assess sponsor positions and competencies.
    - Prosci eToolkit: Prosci Sponsor competency Assessment, Prosci Primary Sponsor Evaluation, Sponsor Assessment Diagram (draw by hand), Sponsor Heat Map (consider the risks before using), Primary Sponsor Checklists
  - Develop your Sponsor Roadmap and sponsor coaching plan; include tasks for Sponsors to engage visibly with the project team and stakeholders.
    - Prosci eToolkit: Sponsor Roadmap template
  - Work with the project manager to formally educate sponsors on their OCM role.

- Quantify and qualify the size and nature of the change.
  - Draft a list of the stakeholder groups.
    - Prosci eToolkit: Impact Index: ADKAR Analyzer
  - Make a high level pass through the change impacts.
    - Prosci eToolkit: Impact Index: Identifying Impact by Group, Change Characteristics Assessment
  - Assess project team and organizational change competencies.
    - Prosci eToolkit: Prosci Risk Assessment, Organizational Attributes Assessment, Team Member Competency Assessment

Organizational Change Project Management Initiating Activities

- Work with the project manager to decide how to manage the OCM team and OCM project plan.

- Take your first change triangle assessment (e.g., Prosci’s PCT Assessment) score to understand strengths and weaknesses between leadership/sponsorship, project management and OCM project components.
  - Prosci eToolkit: Impact Index: PCT Assessment

- Document OCM risk and either add it to the project risk register or keep it in a separate OCM risk register.
  - Prosci eToolkit: Sponsor Risk Grid Customizations and all other Risk Assessment and Risk Grid Customization tools
OCM and Planning

During Planning, start executing your sponsor roadmap, finalize the OCM project success measures and finalize the stakeholder groups and the scope of impact to each group. Build the initial version of each of the five OCM plans. Continue regular conversations with the project manager and sponsor and project team.

Organizational Change Planning Activities

- Execute the Sponsor Roadmap.
  - Coach your sponsor(s).
  - Update the Sponsor Roadmap and coaching plans as needed.
- Educate and coach the project team on OCM.
  - *Prosci eToolkit: Change Management Overview, ADKAR Model, The Case for Change Management*
- Finalize OCM project success measures/criteria with the project sponsor and project manager.
- Update the scope and nature of the change.
- Finalize the list of stakeholder groups and finalize the scope of the impact to each stakeholder group.
  - *Prosci eToolkit: Impact Index: ADKAR Analyzer, Identifying Impact by Group and separate Excel listing change impact details*
- Draft and finalize something in each of the remaining OCM plans.
  - Communications
    - Build a brand identity that stakeholders can embrace.
    - Develop branded communication artifacts for each communication channel (e.g., web banners, emails, PowerPoints, etc.)
    - *Prosci eToolkit: Communications Plan Worksheet, Communications Key Messages*
    - *TAC 216 Communications Plan*
  - Coaching
    - *Prosci eToolkit: Coaching Plan Template, Individual Coaching Plan Template, Group Coaching Agenda, Coaching Training Template*
  - Resistance Management
    - Think about where people will struggle and resist the change.
      - *Prosci eToolkit: Resistance Management Plan Template, Resistance Assessment Worksheet*
    - Develop a strategy to use managers to fulfill their communicator, advocate, coach, liaison and resistance manager (i.e., Prosci’s CLARC) roles.
      - *Prosci eToolkit: Manager Competency Assessment*
    - Develop a strategy for stakeholder engagement.
    - Decide how to structure and use a change network.
      - Develop an initial strategy for what the network will accomplish, their roles and responsibilities, meeting timeline and similar.
  - Training
If possible, work with local training resources to help you choose training channels and decide the most effective ways to deliver training in your culture and environment.

- Develop a strategy to build and reinforce stakeholder skills and deliver training.
- Decide how stakeholders will get help after go live.

- Begin executing the Communications Plan.
  - Start drafting your detailed communications plan; start making presentations to leadership groups.
  - Start working on project branding and communication templates

Organizational Change Project Management Planning Activities

- Develop your OCM budget.
- Select and stand up the OCM project team and consultants (if needed).
- Determine the OCM timeline and key OCM milestones.
  - Prosci eToolkit: Change Definition Checklist
- Review the project plan for meetings where requirements are discussed with stakeholders and/or the project team and consider adding an OCM resource in the meetings to listen for change impacts.
- Schedule Change Network meetings and set up distribution lists, Listservs, collaboration sites, etc.
- Take your second change triangle assessment (e.g., Prosci’s PCT Assessment) score.
  - Prosci eToolkit: Impact Index: PCT Assessment
OCM and Executing

LISTEN! LISTEN! LISTEN! to the sponsors, project leadership and stakeholders. Continue executing and changing the OCM plans based on how the stakeholders are adopting the change. Finalize the change impacts and training plan, then develop and deliver training.

Organizational Change Executing Activities

- Execute the Sponsor Roadmap.
- Execute the Communications Plan.
- Execute the Coaching Plan.
- Execute the Resistance Management Plan.
  - Meet regularly with your Change Network.
  - Start surveying and listening for feedback; adjust the other OCM plans based on what you learn.
    - Prosci eToolkit: Listening to Employees and Gathering Feedback, Employee Feedback Worksheet, Resistance Assessment Worksheet
  - Execute the Manager CLERC tasks you identified in Planning.
  - Develop Corrective Action Plans.
- Fully document the change impacts.
  - Finalize the ADKAR Assessment and list of stakeholder groups.
  - Finalize the change impacts by stakeholder group.
    - Prosci eToolkit: Change Impacts by Group (on the Impact Assessment)
  - Build a separate Excel of change impacts by category.
- Execute the Training Plan.
  - Define the training requirements from the change impacts.
    - Prosci eToolkit: Training Requirements Template, separate Excel with Change Impacts by Stakeholder
  - Build, deliver and assess training materials and training experiences.

Organizational Change Project Management Executing Activities

- Update your budget.
- Update OCM risk.
- Take your third and fourth change triangle assessment (e.g., Prosci’s PCT Assessment) scores.
  - Prosci eToolkit: Impact Index: PCT Assessment
OCM and Closing

Assess what worked well for the OCM team, the sponsors, the project manager and the stakeholders and talk about what can be done differently next time.

Organizational Change Closing Activities

- Build an OCM lessons learned package for your project sponsors.
- Assess achievement of success measures/criteria.

Organizational Change Project Management Closing Activities

- Take your final change triangle assessment (e.g., Prosci’s PCT Assessment) score.
  - Prosci eToolkit: Impact Index: PCT Assessment
- Conduct lessons learned.