

Project Managers Make Great Change Managers

by

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Introduction

Everything is subject to change, and that includes the role of the Project Manager. As the project management profession continues to mature, the scope of the project manager's role and the skills needed to be an excellent project manager continue to grow.

One of the most important changes facing project managers is the expectation that the benefits promised in a project's business case will be delivered *during* the project lifecycle. The scope of the project manager's role has widened from the management of delivery to the management and sometimes the realization of the benefits promised.

In addition, there has been a greater emphasis on how to implement project deliverables as effectively and as efficiently as we create them. Complicating this challenge is the multiplicity of projects and their interconnectedness. Projects can often overlap and impact many different business processes, departments, staff and systems.

Change management and business transformation have become popular topics, leading to the appointment of specialist change roles, with some duplication of responsibility between the Change Managers and Project Managers. Project managers have to define their contribution in this new world, so they have to develop an understanding of what change management is and how it aligns to project management.

It is also important to realize that effective change management incorporates risk management as well. There are so many projects today that we are in danger of overwhelming the business which generates the revenue to pay for the projects in the first place. A robust change management approach assesses the readiness for change and will only authorize project go-live if the business has prepared for the change and has sufficient capacity to cope with an initial fall in productivity as staff adapt to new ways of working.

What is change management?

Change management is a structured way to transition individuals, teams, and organizations from their current state to a desired future state. Change is a psychological disturbance, as people lose the certainty and comfort of their known state and have to swap this for the risks and uncertainties of the new ways of working. Those who have to work differently in the future have to be persuaded of the need to change and reassured that they will be helped to change.

To make change happen we need to include activities that generate awareness, acceptance and enthusiasm for the change along with tasks and opportunities to make it as easy as possible to get involved in adopting the change. We must shift the culture of the organization and not just the processes.

Think of a typical change that happens at work. For instance, a new time tracking system is introduced. The software is simple to use and doesn't require any new log-on details or passwords. Even so, not everyone starts using it immediately, and some people try it initially but don't continue to use it. This typically occurs because users have to change what they think about when they are working and carry out new tasks. For instance, before starting a piece of work, they have to remember to access the software to note the start time and then access it again to record the end time. They also have to decide if any interruptions are so long they have to record a finish time and restart the work later. So there are lots of extra things to think about and to remember, on top of all of their existing responsibilities.

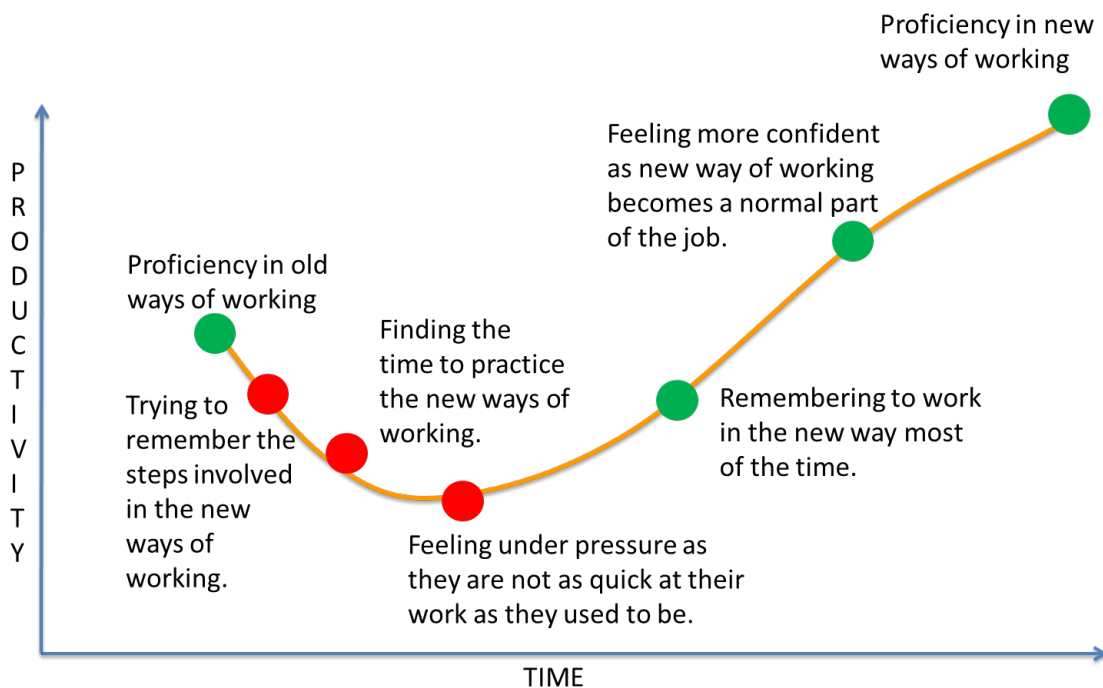


Figure 1 -- Typical transition from old to new ways of working.

The project to implement this time recording software has forced users to transition (**see figure 1**) to a new *business as usual*. Users move from comfort and stability in how things work into a period of uncertainty as their old procedures and systems are dismantled and replaced with an approach that they have never used before. They become fearful of making mistakes and feel under pressure to become as proficient in the new ways of working as they were in the old ways as quickly as possible. With plenty of practice, lots of encouragement and an environment that supports trial and error, users can acquire the necessary proficiency--but it won't happen overnight. As project managers, we have to respect this and build sufficient practice activities into our project plans.

Why is change management an important part of project management?

Managing change is now an essential element of project management because it is only when users have successfully completed the transition from old to new ways of working that benefits can be realized (**see figure 2**). Unless the use of project deliverables are fully adopted into how people do their jobs, those jobs will not achieve the efficiency improvements that business cases promise. If the project deliverables are expected to generate new revenue from offering new products and services or targeting customers in new markets, this will not be achieved until the project deliverables have been successfully communicated and adopted by customers.

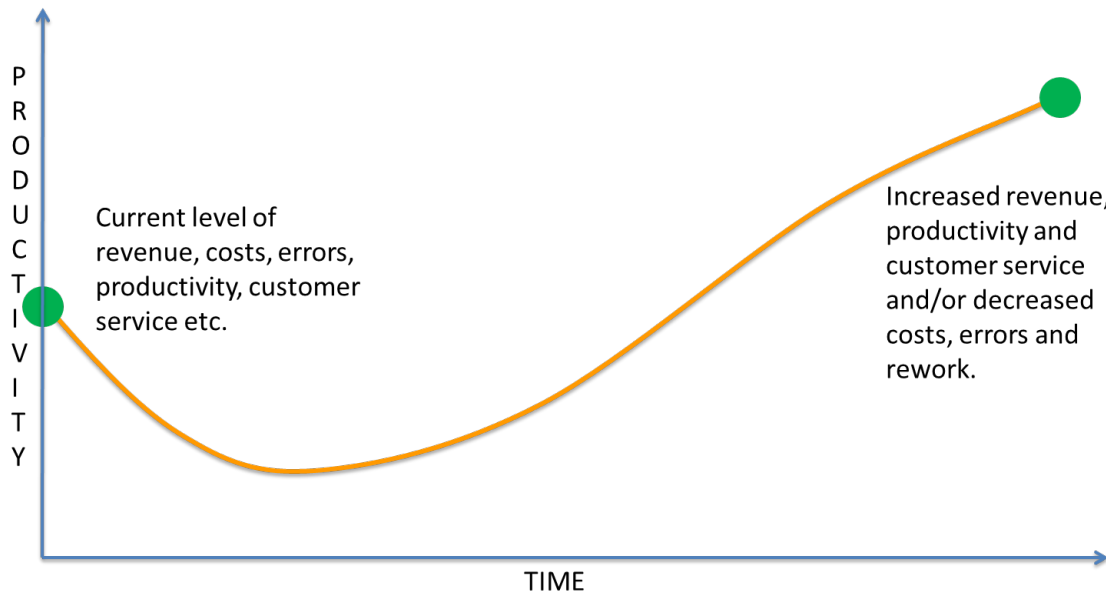


Figure 2 -- Importance of change management

I think the main difference between the project management that I was originally taught (20 years ago!) and the way in which I need to manage projects now is the responsibility for generating the adoption of my project deliverables. It is no longer sufficient to deliver on time and on budget to the right level of quality. I now need to ensure that the project deliverables become a part of how people work, and that there is a clear and beneficial difference between the business as usual *before* the project and the new business as usual *after* the project.

Unless project management and change management are merged, the promised business benefits will have to wait until the change lifecycle has run its course (**see figure 3**). Three phases characterize the change lifecycle. Initially, users are faced with the reality of changes associated with a project and require reassurance that life will be better as a result of the changes. Second, is a period of experimentation and practice whereby users are encouraged and coached to try the new way of working or the new system. Finally, the new ways of working and new procedures become the new *normal* and life is good again.

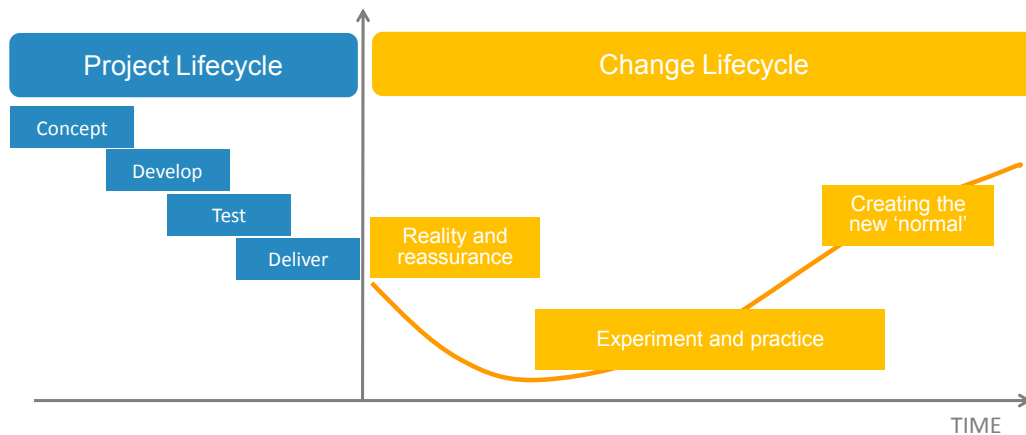


Figure 3 -- Separate project and change lifecycles

In order for project benefits to be realized sooner, project management and change management must be integrated. This might mean that the project lifecycle becomes extended as the transition activities for leading people through change are included in the Project Plan. However, this additional project duration and cost is the price of change management—it would happen anyway. The figure below (**see figure 4**) shows how project and change lifecycles can be integrated. This approach transitions to the new ways of working more quickly and so realizes benefits more quickly as well.

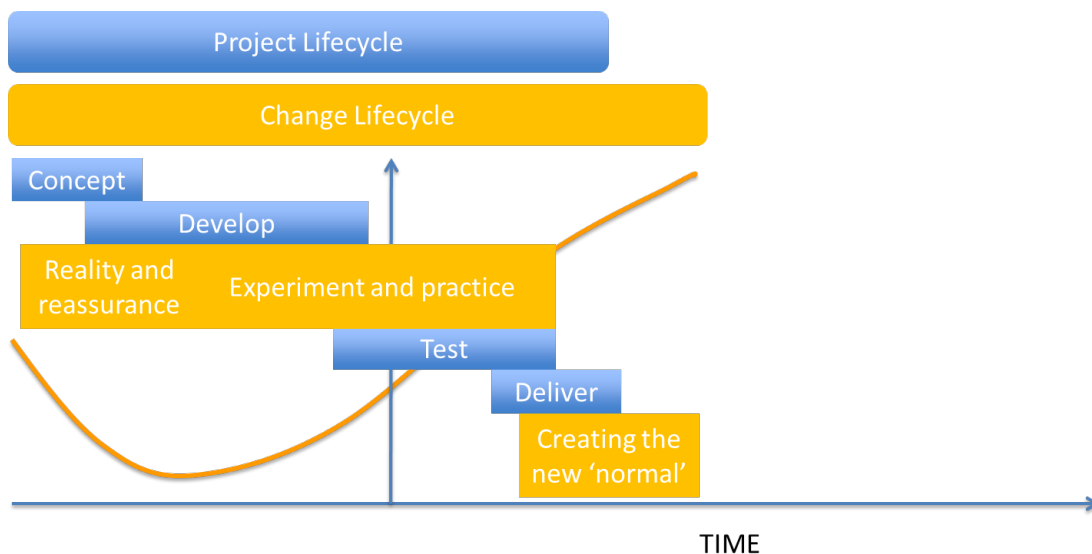


Figure 4 -- Combined project and change lifecycles

The integration of project and change lifecycles increases the workload for project managers, but it is clearly worth it if we can increase the number of projects that realize or exceed the benefits promised. I am sure you can add your own reasons to the reasoning I have shown below (**see figure 5**).

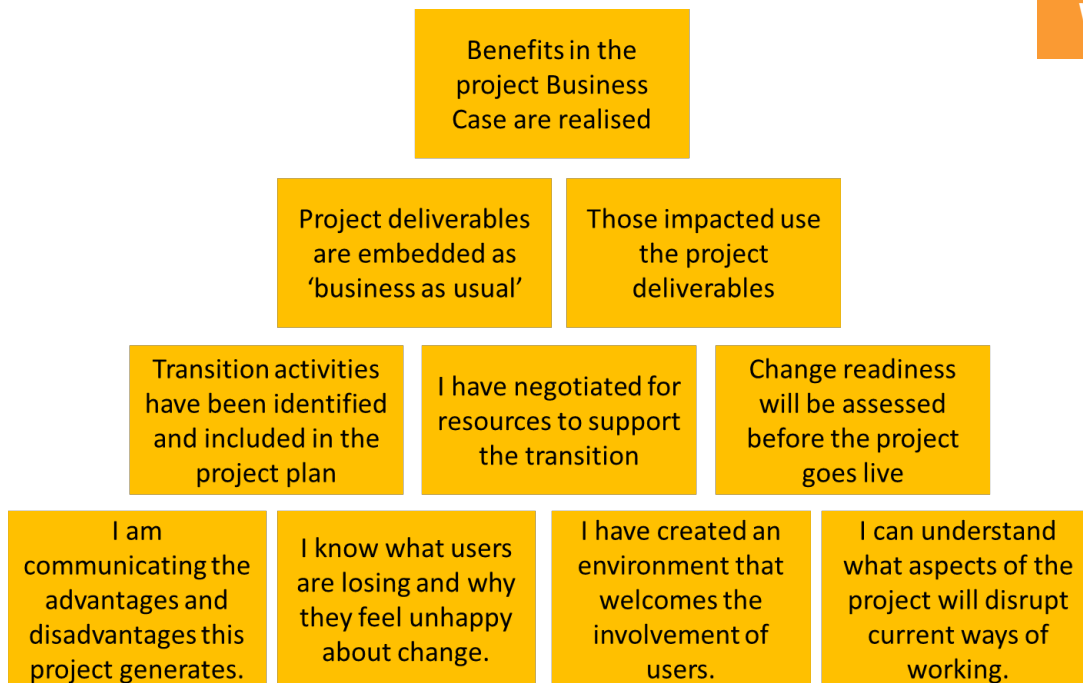


Figure 5 -- Reasons for including change management activities into projects

How do we make change happen?

The change management lifecycle takes customers on a journey, providing support for each step. Let's take a closer look at this three-step journey:



Figure 6 -- Change management activities

Reality and reassurance

At the start of the change, we need to be prepared to explain why the change is needed and what the benefits will be. At the same time, we need to clarify exactly what will change and what will remain the same so that we minimize confusion and prevent rumors from developing about the likely impact of the change.

Project activities need to be a balance of reality and reassurance. This means we need to provide lots of demonstrations of what is being produced to generate the reality and a sense that “yes, this is really happening”. This needs to be coupled with reassurances that users will have sufficient opportunities to practice using project deliverables through involvement in testing, the creation of model offices and sandboxes. We can also provide reassurance by asking those affected what support they require and then add these requirements into our Project Plan. For example, demonstrations, video help guides and the provision of *super-users* take time and must be integrated with other project activities.

There is also the need to build in time for users to mourn the loss of the old ways of working. Some people might find this overly sentimental; however, psychological studies have identified the importance of enabling people to acknowledge their losses and feel sad about them before they are able to fully embrace new opportunities. In a practical sense, this means giving people lots of opportunities to discuss the changes. In this way, users can express their sadness or frustration at having to unlearn their current skills before they are ready to invest time and energy in learning how to work differently. Ignoring this step and pretending that there are no downsides to change is naïve. People adjust quicker when we are honest about the losses as well as the gains.

Experiment and practice

Change is not a linear. Once the process of loss is underway, we need to create opportunities to become involved in the change and dispel the fear associated with the unknown. These opportunities have to meet the different preferences of users. They have to choose to get involved, so we are relying on their own motivation, which is increased if the activities offered are engaging, relevant and easy to do.

My way of learning about a new system or process is to read about it. I like to know the background information, such as why it is needed, what the alternatives were, and how it is supposed to work. It also helps if there are easy-to-follow step by step instructions. On the other hand, my colleague does not like to read; she likes the hands-on approach and to work things out on her own. Another colleague prepares herself for new ways of working by asking others what their experience has been. She likes posting questions to on-line user groups and researching product reviews on-line. Activities included in our Project Plans need to support all of these approaches.

During this period of practice and experimenting with the new ways of working, we have to create an environment that encourages experimentation and minimizes the fear of failure by ensuring those that practice will not be punished for their failures. After all, when we do something for the first time it is unlikely to be right—we will make mistakes. If those mistakes are recorded against our performance, we will be more hesitant about trying, which will stop us from building up any proficiency in the new ways of working. This can lead to delays at the point when project deliverables are ready for use because users are too fearful to incorporate them in their work.

Creating the new normal

Once users have started using project deliverables, we need to ensure that they become the norm and an automatic part of how people work. Our goal is to reach the point when people have forgotten about our project because they have stopped thinking about the project deliverables as anything other than normal. This can be accomplished by making sure that new processes are recognized across the organization, from new employee training to the audit department.

What does great change management include?

The aim is to enable our users—the ones that have to adopt the project deliverables—to have a *transforming* idea. We want them to come to the realization that the project deliverables have the ability to make their work easier, quicker to perform, or more interesting. Once they have this idea, then they are willing to help us design, develop and test the project deliverables.

It is this participation that prepares them for using the project deliverables. We need to do all we can to achieve this. Our project plans need to include a wide variety of transition activities, capable of appealing to the widest possible group of users. These activities need to cover all aspects of the project lifecycle, including the following areas:

Visioning and business value

To identify project deliverables you will need an understanding of how *business as usual* might need to change. You need an understanding of the bigger business picture. We need to move away from a simple objective or project purpose in favor of a vision of what the business will look like once the project has completed. This will enable us to debate the problems that the project will fix and the opportunities that it will help the business to exploit. The project team gains more freedom as the project becomes about delivering real business value, rather than being a vehicle to deliver a pre-defined solution.

Requirements gathering and project scoping

This vision helps to clarify the scope of the project and, if it is done well, this scope will enable all project activities to be easily compared against it so that only those deliverables and activities that create this vision are included. This is the most effective way to ensure that the project is based on necessary requirements and is able to avoid unnecessary requests. By viewing the project as a business change rather than a solution, the requirements become more focused on achieving the necessary changes.

Impact assessment

Identifying who is going to be affected and how they are going to be affected enables users to contribute their preparation activities to the project plan. Project team members and users work collaboratively to identify what needs to change and what can be retained from the current business as usual environment. Project team members can provide valuable technical input because they can advise on how the project deliverables need to be supported and/or maintained in the future. Those impacted can make sure these considerations are included in future department budgets and become part of any Quality Management System.

It is important to consider the impact on the full range of stakeholders, both internal and external to the business. What will be the impact on external customers and suppliers?

Testing of project deliverables

User involvement in the testing of project deliverables provides a feeling of involvement and ownership. This helps them to recognize that change is really going to happen and that they need to prepare for it. Testing helps users understand how things work and generates ideas about how they might be used in practice. Testing is a catch-all term for any type of review, walk-through, demonstration or use of prototype version. It is in the interests of the project team to encourage as much feedback as possible because this helps to shape the best possible project deliverables. This involvement enables users to immerse themselves in new ways of working and helps them identify what needs to change in how they currently work so that they can easily adopt the project deliverables.

Readiness assessments

Impact assessments, readiness assessments and collaborative testing with users can all help to identify the required support needed for users to successfully implement project deliverables. Project Managers can make a big contribution by ensuring that these assessments are scheduled prior to all deployments from the project and that the questions become standardised across all users. This might include training, explanations of how to maintain the project deliverables after go-live, creation of user guidance or release notes. This work needs to be captured in the Project Plan and resourced.

What are the skills needed for effective change management?

There is a lot of cross over between the skills needed for project management and change management. Some of the key skills that Project Managers can easily transfer into change management include the following:

Project managers need to be great organisers and planners because there are so many tasks needed to take an initial idea and develop it into fully tested, working deliverables. Project plans today must be even more encompassing than ever before. As change managers, we have to do exactly the same thing, but the activities are primarily psychological—persuading, influencing, motivating and enthusing people to undertake change.

Project and Change Managers need strong stakeholder identification and engagement skills. Communication of change needs to start as early as possible so that people have time to accept the change before they have to start working in new ways. We need to drive engagement and participation to help people through the transition curve to the new normal.

Project Managers are good at forming effective teams because they are used to working with diverse groups of project team members on different projects. Change managers need to apply these team building skills to create networks of change champions who will lead the change in their areas, and help their colleagues to adapt to the new ways of working. Project teams have grown in size and scope in recent years, and now include end users as active participants throughout the project lifecycle. Project teams are far more inclusive and collaborative than ever.

Project Managers need to pro-actively search out anything that could impede their project progress. This willingness to scan the horizon for risks and issues is just as important in change management. However, the types of risks and issues might be different. In project management the problems are more tangible: late deliveries; things that don't work as they are supposed to; and development tasks taking longer than anticipated. In change management we are looking for more subtle indicators: people who are not convinced that the change is important or worthwhile; and people who say they are too busy as a defense mechanism to protect themselves from the change.

Project Managers who become effective Change Managers have tapped into their emotional intelligence. They are deploying empathy with their users to appreciate the challenges, fears and anxieties that the project is generating. They are willing to spend time listening to those affected, letting them talk their way through their fears until they come to the realization that the change is workable and is beneficial.

Conclusion

Project management is changing. We have to be willing to do the *soft* aspects of engaging our users and helping them to believe in the project as much as we do. We need to see our users as an extension of our project team, and involve them in making the project a reality.

About the Author:

Melanie Franklin is an expert in the field of Agile and Change Management theory and practice. In addition to her role as Co-Chair of the Change Management Institute UK, she has authored 10 books, provides international consulting and delivers accredited training courses. From leadership to projects and change, her insight helps those who want to make a difference. She constantly seeks ways to help individuals and organisations to be more efficient through use of proven tools and techniques.

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