

CHANGE MANAGEMENT

PART 1 OF 2: FUNDAMENTALS

DECEMBER 13TH 2023

Housekeeping

What to keep in mind for today's webinar:

- We encourage everyone to turn their camera on to increase engagement
- Everyone is muted, if you have a question or comment, please:
 - Type your question in the Chat Box
 - Ask a question using the Raise Hand function
 - If un-muted, please state your name and title/department
- Slides/webinar materials will be shared post-session
- The Research PMO values your opinions & feedback:
 - Please complete our post-session survey



We Need CHANGE!!!



Reference #1

Introductions – Research PMO



**Margeya
Patel**
Sr. Project
Manager
Research PMO



**Stephanie
Bowles**
Change
Management
Specialist
Research PMO



**Anne E.
Geary**
Assistant
Director
Research PMO

Research PMO OVERVIEW

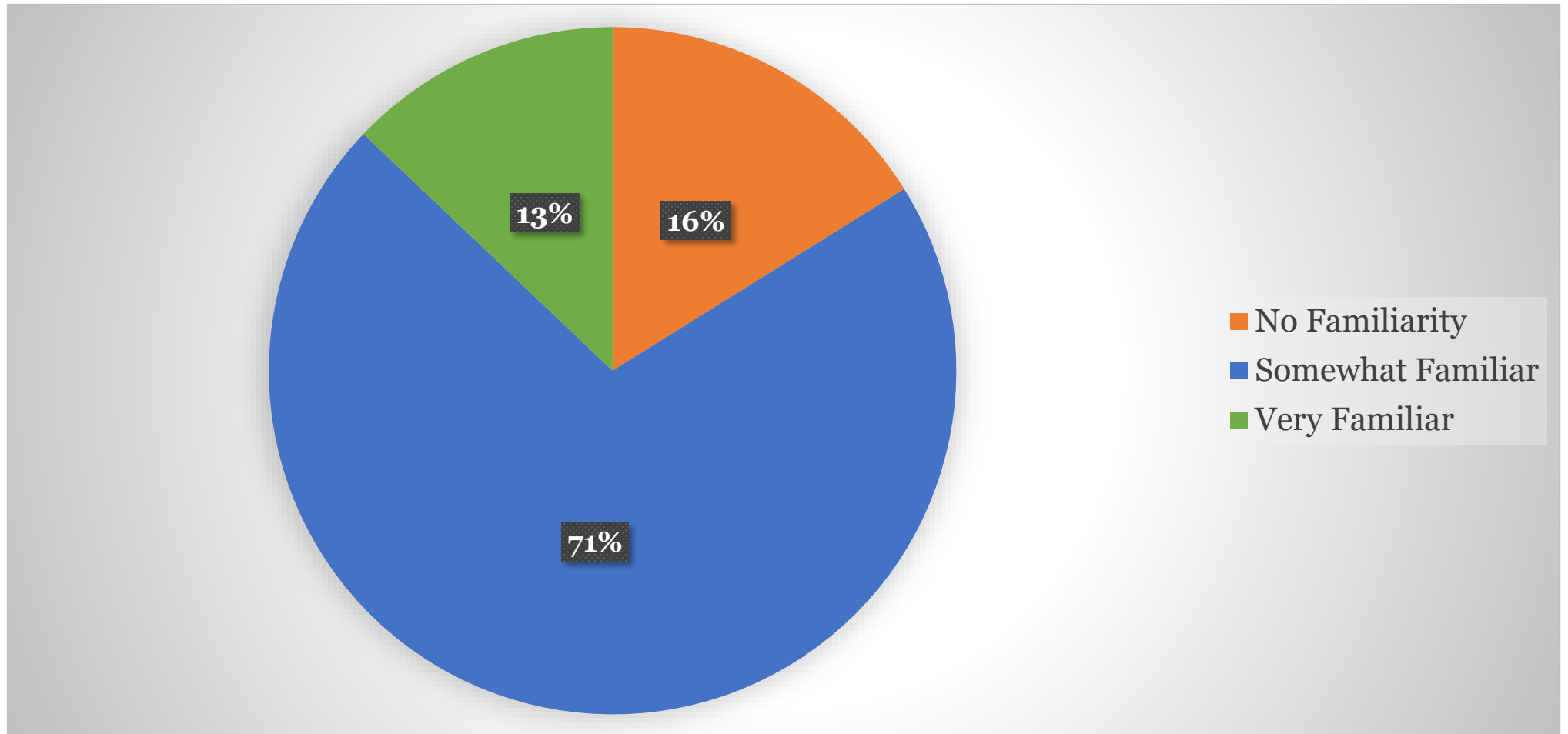
Our Mission

“To support the Research Institute with professional project resources that leverage change management, business agility, risk mitigation, data driven decisions, communication and best practices that ensure the successful delivery of transformational and other valued projects”

Services Provided

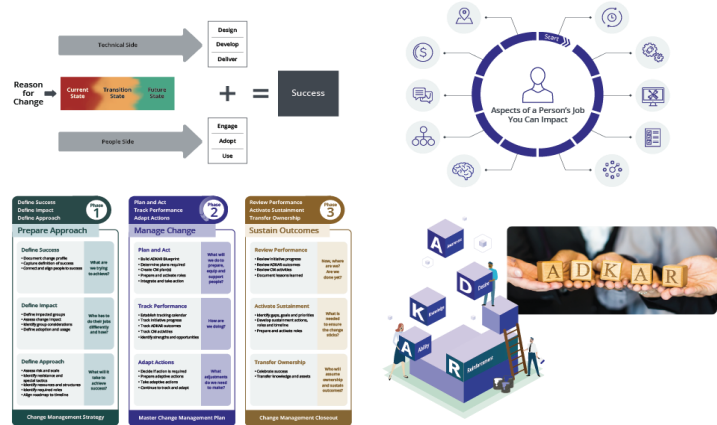
- Project Management and Business Analysis
- Change Management and Process Improvement
- Advisory, Audit, and Governance
- Education
- Recommendations for Tools and Templates

How familiar are you with Change Management?



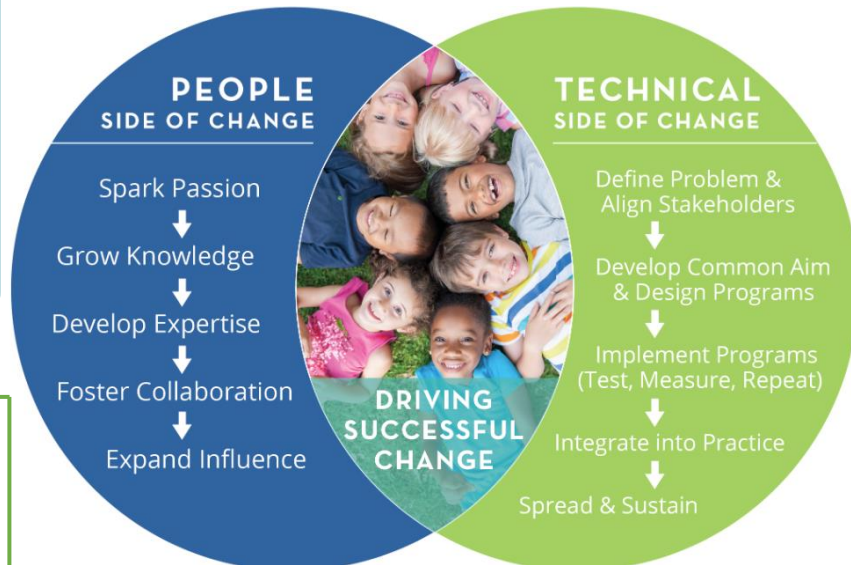
Why are we all here?

Context and Foundation for Change Management



What is Change Management?

What is a Change Methodology?



How does Change Management fit into the overall knowledge areas of Project Management?

Tools

Wrap up

Reference #9, 10

WHAT IS CHANGE MANAGEMENT?

High Level definition

What is Change Management?

A *comprehensive, cyclical, and structured approach* for *transitioning* individuals, groups, and organizations from the *current state to a future state* with intended business benefits.

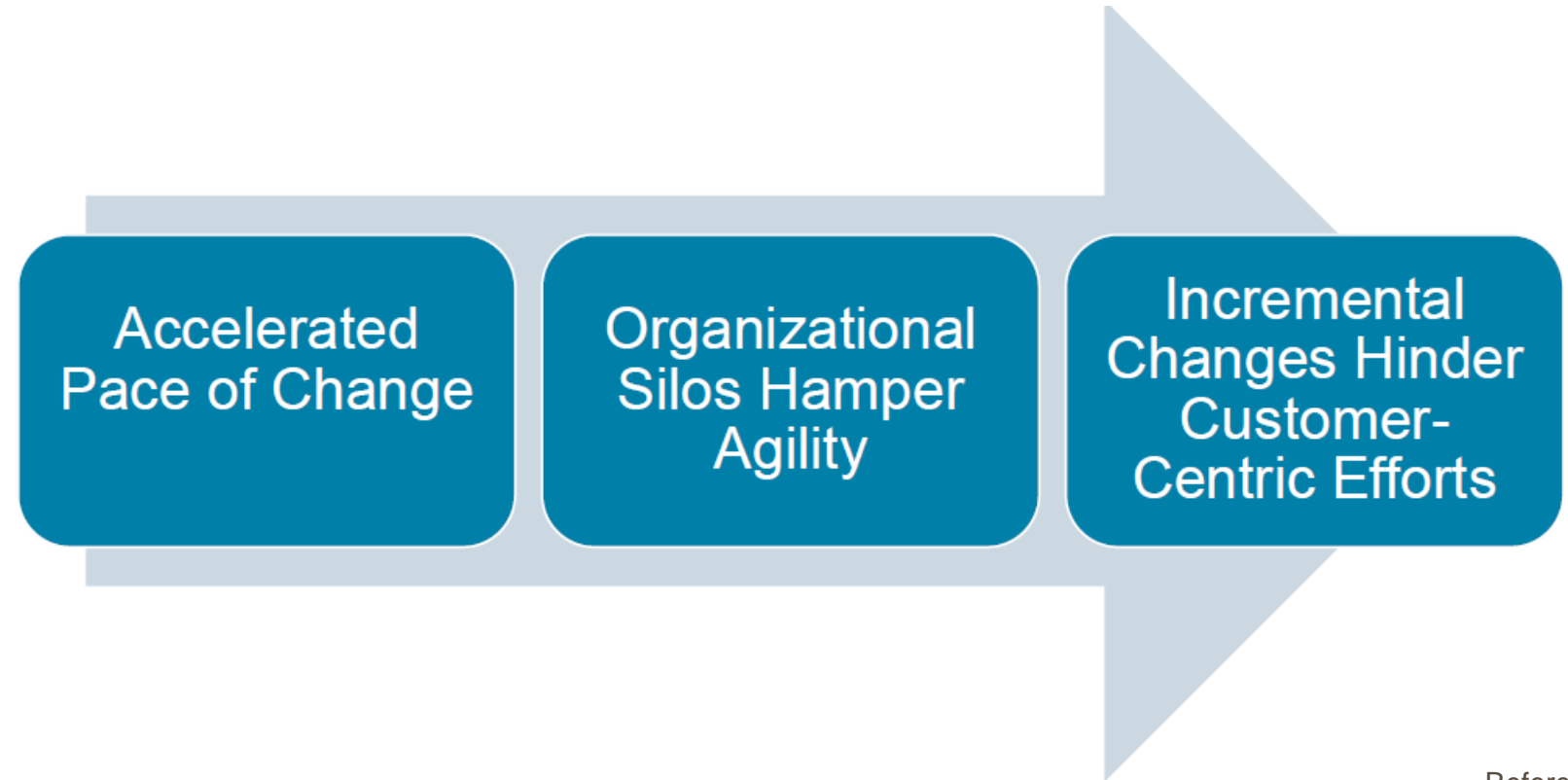


Reference #2, 5

Why Change Management?

There is a gap in a systematic approach to adopting change and the need to have those efforts spearheaded by someone who is trained in doing so.

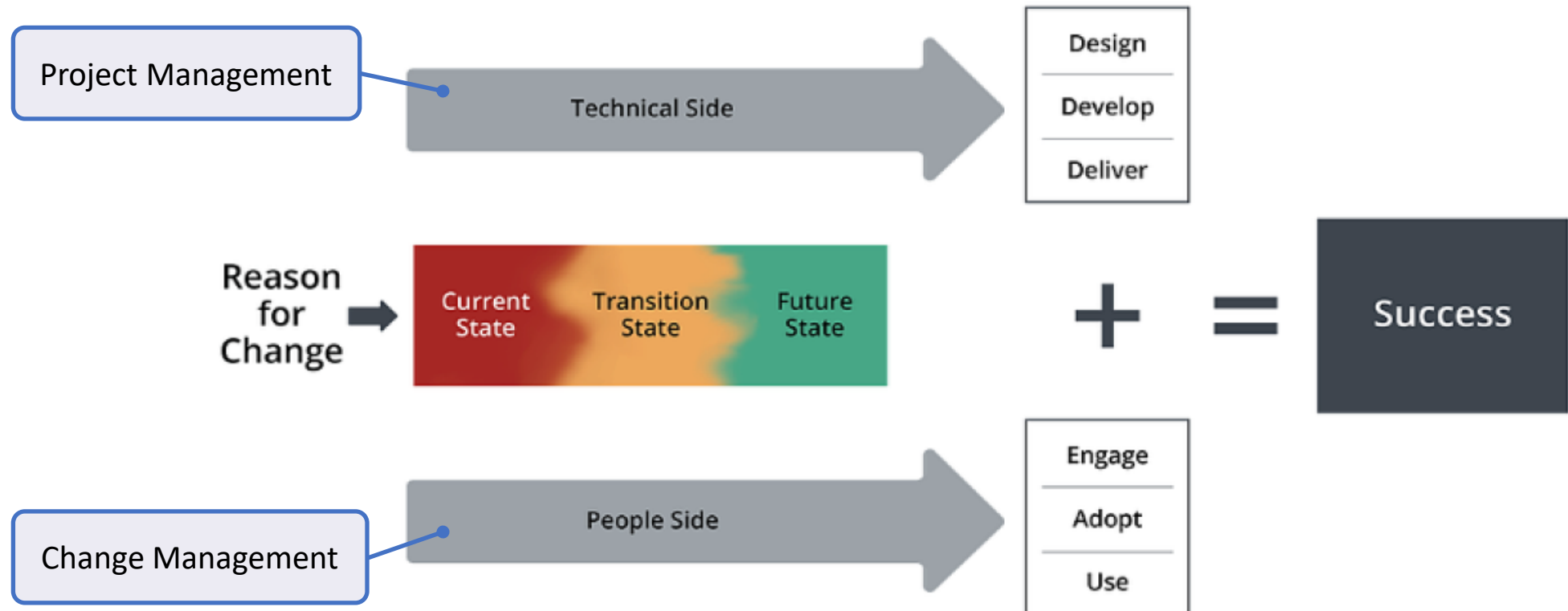
Customer Pain Point



Reference #3, 6

Change Management Impact

Unified Value Proposition is an organizing framework for describing and advancing change. It shows how the technical side and people side of change must come together to ultimately deliver success with a change effort.

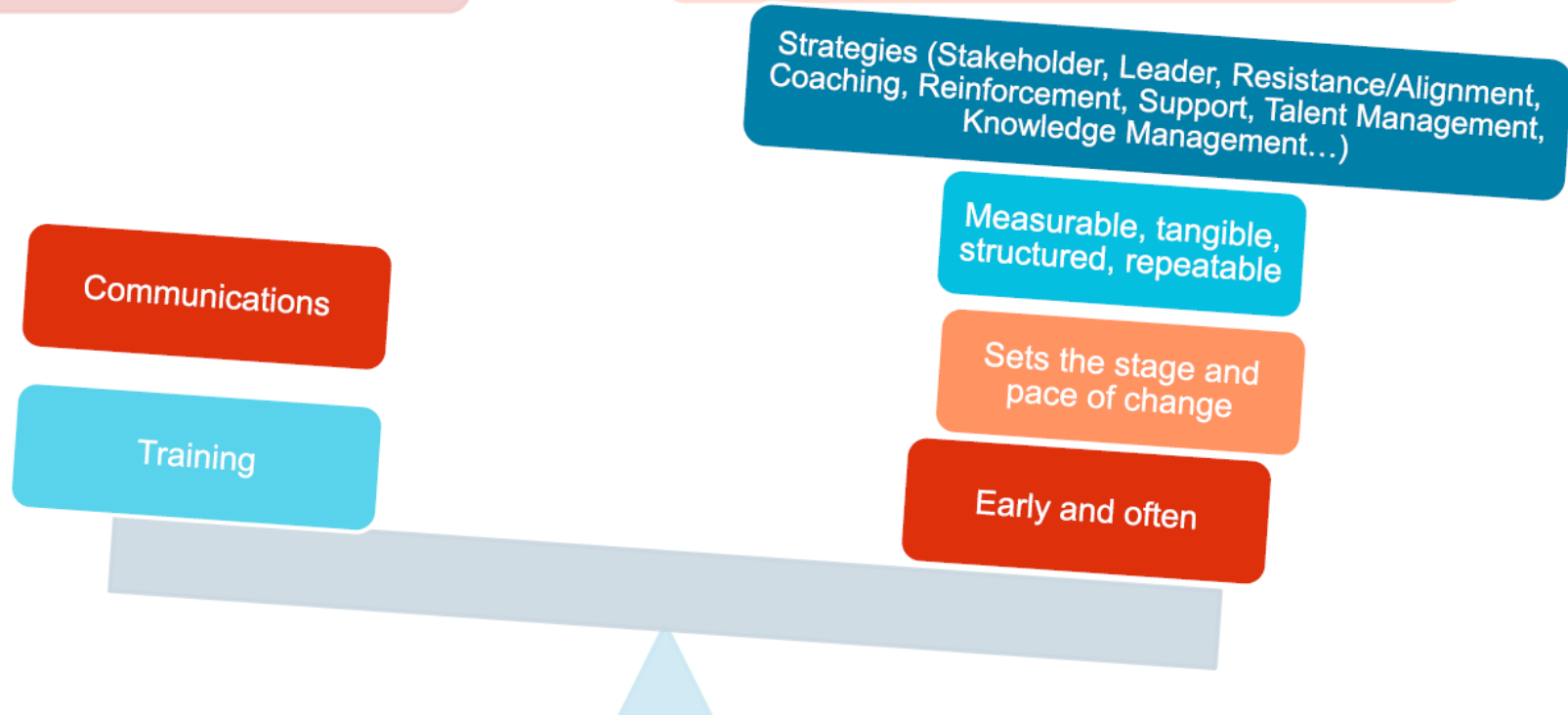


Reference #6

Change Management Facts vs Fallacies

OCM Fallacies

OCM Facts



Reference #4

KNOWLEDGE CHECK

WHAT IS A CHANGE METHODOLOGY?

Why Is Change Management Important?

With Change Management



Without Change Management



Unified Value Proposition

“Technical” does not just mean ‘technological’



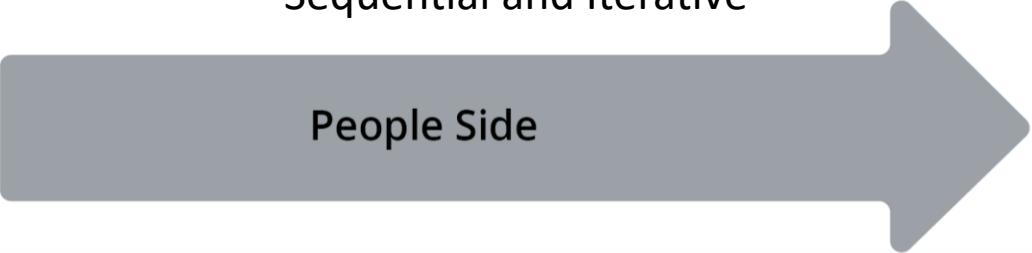
- Design
- Develop
- Deliver

“Technical side” executed by project management discipline

Reason for Change



Sequential and Iterative





- Engage
- Adopt
- Use

“People side” executed by change management discipline

+ =

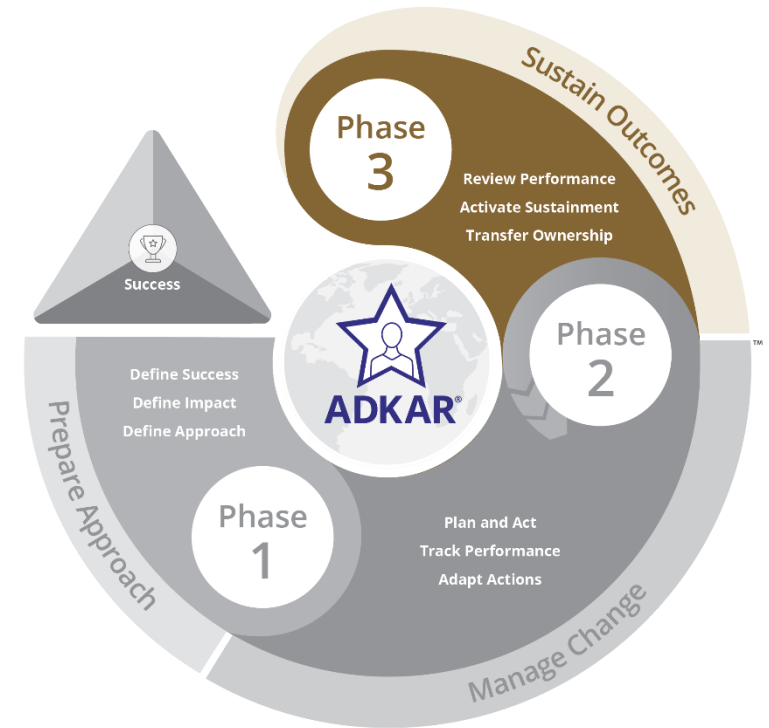
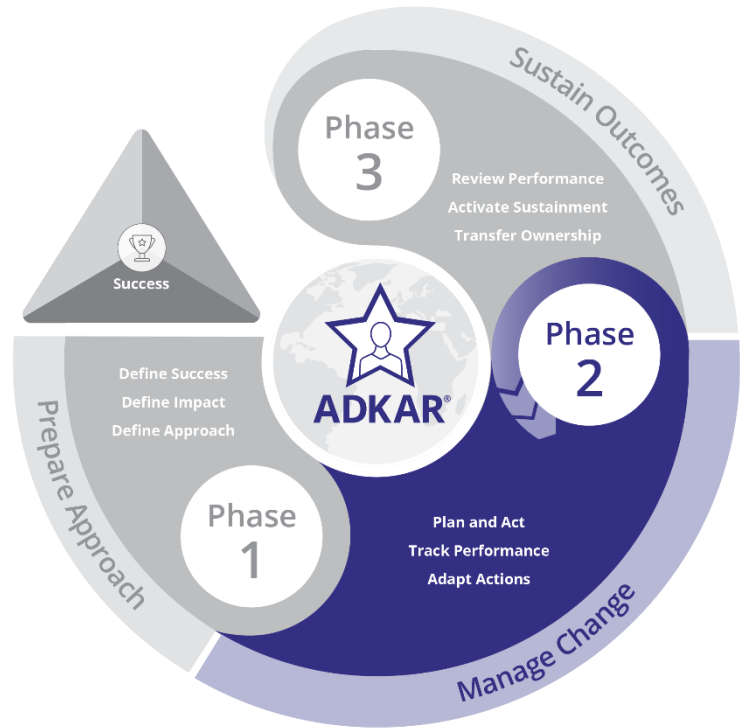
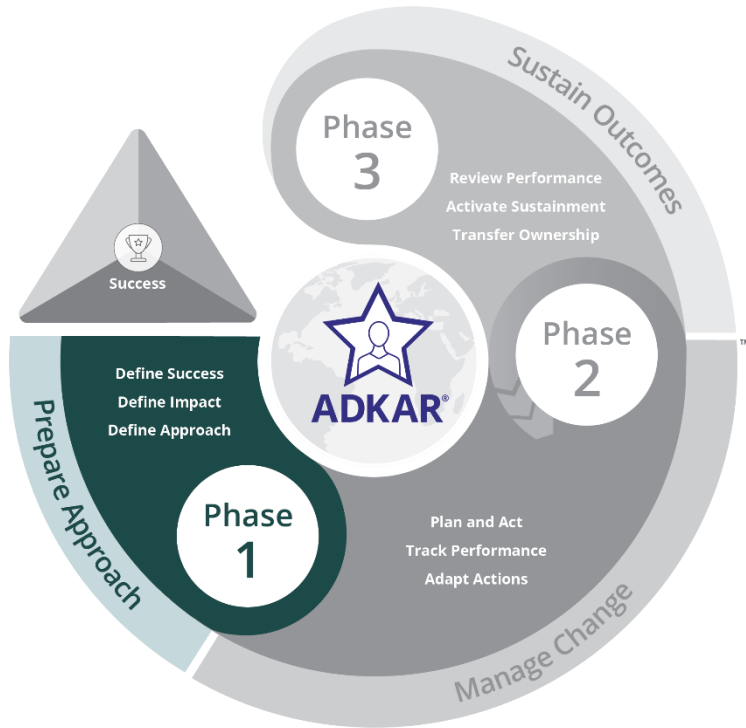
Success

Avoidable Costs and Mitigable Risks

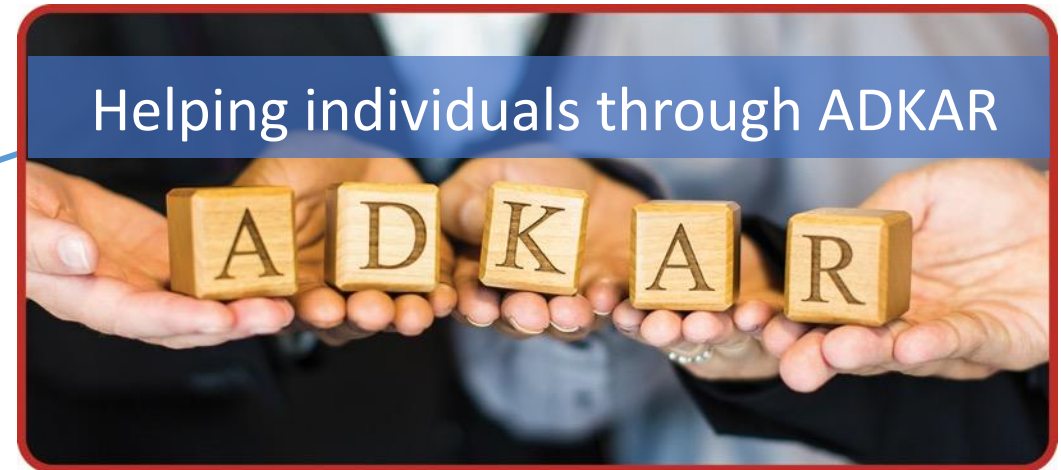
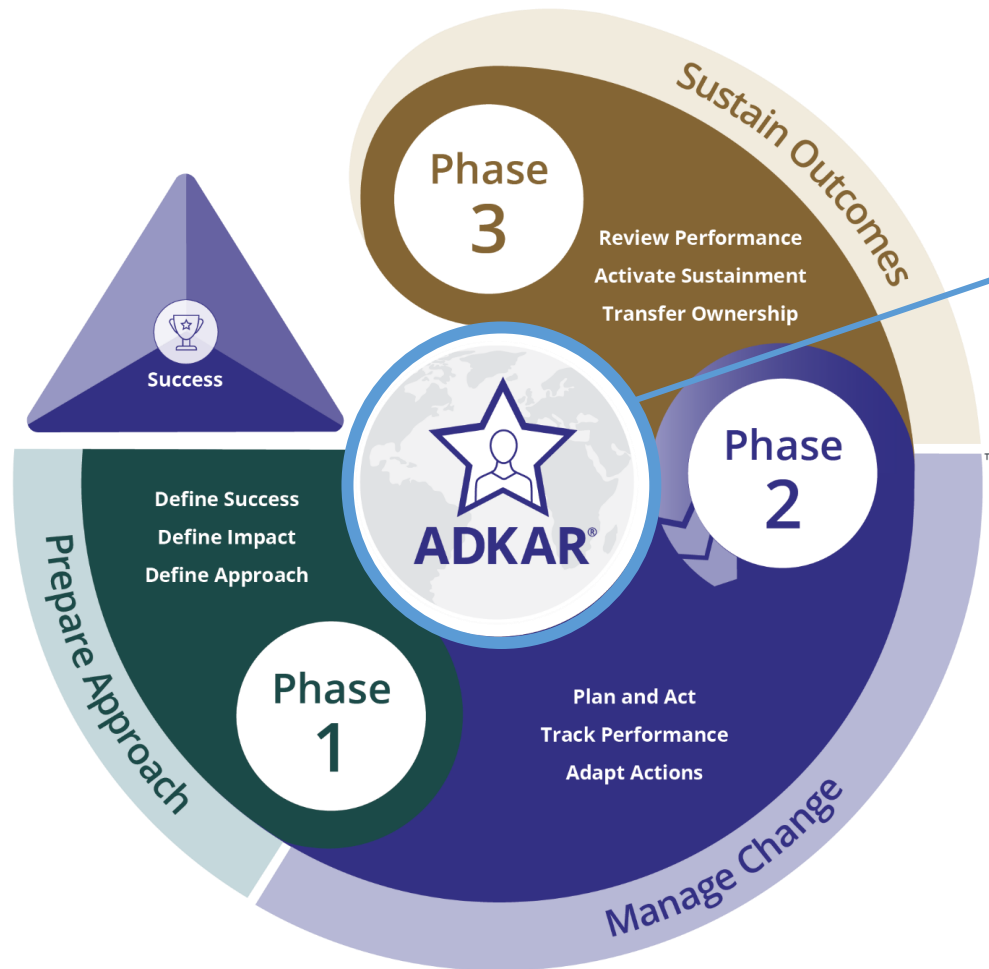
	 Costs:	 Risks:
To the project if we do not manage the people side of change well	<ul style="list-style-type: none"> • Project delays • Missed milestones • Budget overruns • Rework required • Loss of work by project team 	<ul style="list-style-type: none"> • Resistance – active and passive • Project put on hold • Resources not made available • Obstacles appear unexpectedly • Project fails to deliver results • Project is fully abandoned
To the organization if we do not manage the people side of change well	<ul style="list-style-type: none"> • Productivity plunges (deep and sustained) • Loss of valued employees • Reduced quality of work 	<ul style="list-style-type: none"> • Impact on customers • Impact on suppliers • Morale declines • Legacy of failed change • Stress, confusion, fatigue • Change saturation
To the organization if this change does not deliver the results we expect	<ul style="list-style-type: none"> • Lost investment in the project • Lost opportunity to have invested in other projects 	<ul style="list-style-type: none"> • Expenses not reduced • Efficiencies not gained • Revenue not increased • Market share not captured • Waste not reduced • Regulations not met

KNOWLEDGE CHECK

The Prosci Methodology is an Enabling Framework for Managing the People Side of Change



Organizational Change Requires Individual Change



Organizational Outcomes are the Collective Result of Individual Change

ADKAR element	Definition	What you hear
A Awareness	Of the need for change	“I understand why...”
D Desire	To participate and support the change	“I have decided to...”
K Knowledge	On how to change	“I know how to...”
A Ability	To implement required skills and behaviors	“I am able to...”
R Reinforcement	To sustain the change	“I will continue to...”

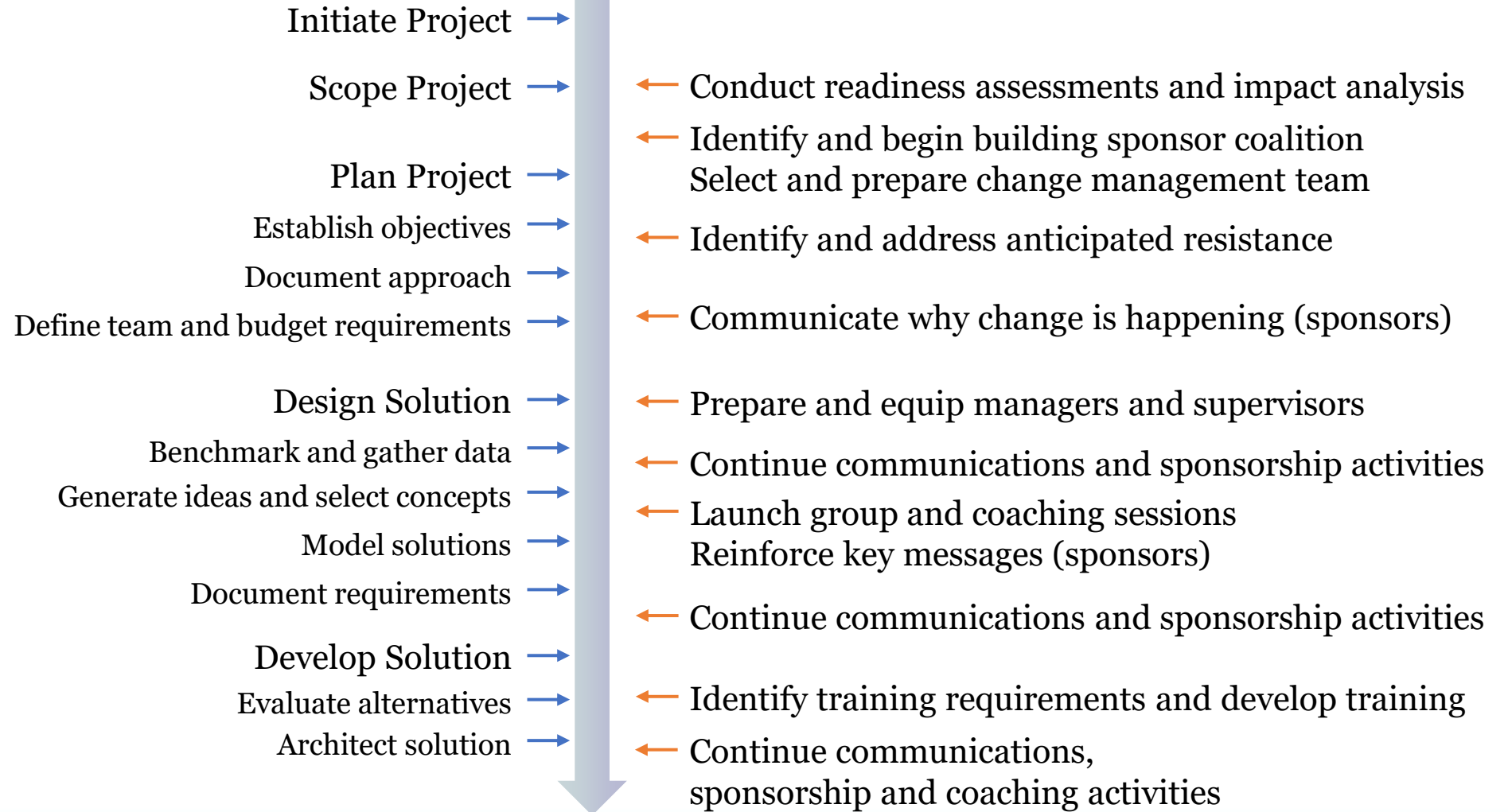
Critical Aspects of Success



Processes

Project Management Activities

Change Management Activities



KNOWLEDGE CHECK

Change for Project Management

“Project management supports a temporary endeavor that change management ensures is sustained.”

HOW DOES CHANGE MANAGEMENT FIT INTO PROJECT MANAGEMENT?

Knowledge Areas*

What are the knowledge areas and why are they important?

- 1 Project Integration Management
- 2 **Project Scope Management**
- 3 Project Schedule Management
- 4 Project Cost Management
- 5 **Project Quality Management**
- 6 **Project Resource Management**
- 7 **Project Communication Management**
- 8 Project Risk Management
- 9 Project Procurement Management
- 10 **Project Stakeholder Management**

*Reference #11

Knowledge Areas Most Impacted by Change

SCOPE

Engage Change Management here to begin evaluating readiness, impacts and incorporating change activity into the overall project plan

QUALITY

Sets the expectation for what the end result should look like

RESOURCES

Ensuring you have the right people engaged to support the project and become change stewards as a result

STAKEHOLDERS

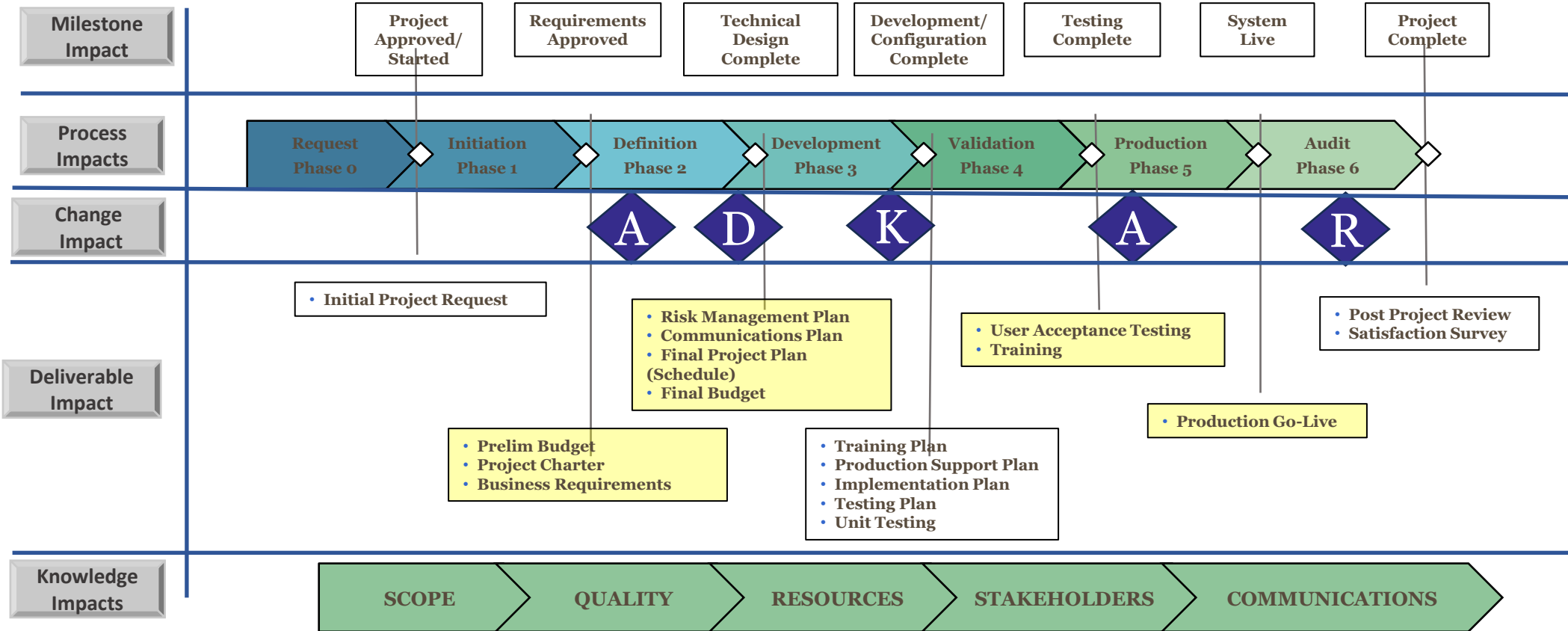
Who needs to provide input, who is impacted and who can be a champion?

COMMUNICATIONS

What do we say about the project, how is it said, who says it and when?

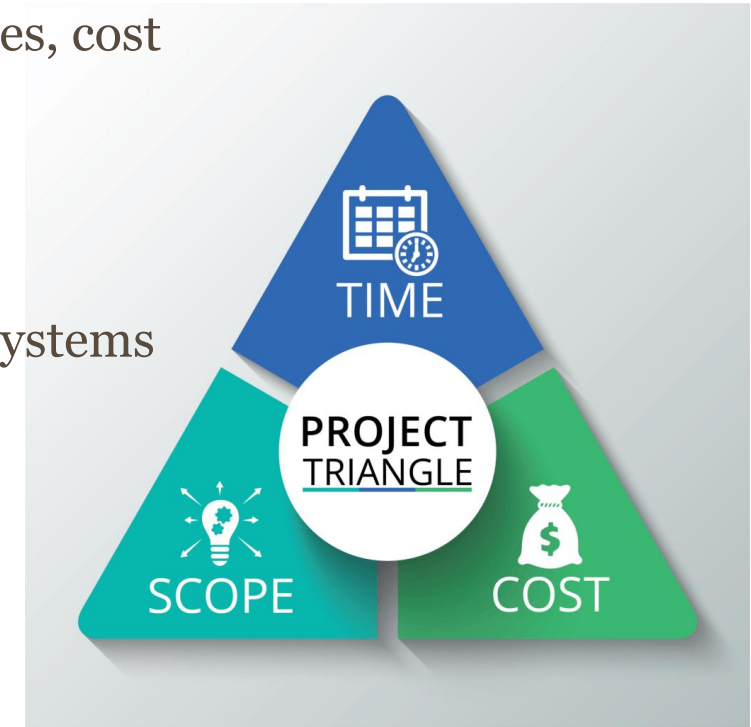
Project Phase Impacts and ADKAR

Key Phase Deliverables for a Waterfall Project Process



Change Control vs Change Management

- Project Changes
 - Requires managing scope and deliverables
 - Formalizing the process for evaluating the impacts to resources, cost or time
- Project Change Management
 - Change that results from a project; process improvement or systems
 - Impacts resources



Reference #8

KNOWLEDGE CHECK

Wrap Up

1

Use a structured plan

Intentional approach to integrate people, processes, and tools

2

Communicate

Clear, frequent, explicit, data-driven

3

Build a relationship

“We’re on the same team!”

4

Emphasize the benefits of CM

CMROI = capturing the people-dependent portion of expected project ROI

5

Educate and train

CMs learning PM; PMs learning CM

6

Secure sponsorship

Active and visible sponsorship of the integration effort

Don't Forget to Complete your Survey

Please join us join us next quarter for....

CHANGE MANAGEMENT PART 2

- The challenges of implementing change management
 - How to create a change management plan
 - How to measure success
- Common mistakes to avoid in change management

Who to call

- **Research Project Management Office (Research Admin)**
 - **Program and Project Management**
 - **Process Improvements, RFPs, System Implementations**
 - **Audit and Governance**
 - **<https://www.research.chop.edu/research-project-management-office>**
 - **DL email: DL-ResearchPMO@chop.edu**

- **Strategy Integration (Enterprise)**
 - **Business Process Improvement**
 - **Business Consulting**
 - **Program and Project Management**
 - **<https://at.chop.edu/sites/administration/strategy>**
 - **Submit an intake for review**

- **Change Management**
 - **Learning**
 - **Support**
 - **Email: bowless@chop.edu**

Additional resources

- **Take a class at CHOP:**
 - Project Management
 - Applying Improvement Methods (AIM)
 - Leading Improvement Course (LIC)
 - MS Office
 - DISC I & II with your team
 - CLI: Presenting with Impact: Presentations Skills Workshop
 - Virtual Meeting Technology Coaching Session
- **Continuous Improvement Class (recommendation from PMO) – CHQA Team**
 - <https://at.chop.edu/chqa/Pages/Home.aspx>
 - Clinical Process Improvement
- **Data Literacy Team**
 - **Information:**
 - <https://at.chop.edu/communities/datagovernancecmte/quick-links/data-literacy>
 - **Open Office Hours: Every Friday from 10:00am-11:00am**
 - **Workshop and Microsession Flyers**
 - https://at.chop.edu/communities/datagovernancecmte/PublishingImages/Data%20Driven%20Micro-Sessions%20Flyer_FY23.pdf
 - <https://at.chop.edu/communities/datagovernancecmte/PublishingImages/Nucleus%20Workshop%20Flyer.pdf>

REFERENCES



Reference list

1. Video Source Slide 3: <https://www.youtube.com/watch?v=vLgxr9MARYs>
2. Photo Source Slide 9: <https://noteslearning.com/change-management-introduction/>
3. Forrester. 2021. Operational Agility: The Key to Business Resilience.
<https://www.cisco.com/c/dam/en/us/solutions/collateral/connect-secure-automate/forrester-operational-agility-emea.pdf>
4. <https://www.projectmanagement.com/presentations/846761/project-success-trifactor--transformational-leadership--organizational-change-management--and-project-management>
5. Managing Change in Organizations: A Practice Guide, 2013, Project Management Institute
6. PMI@Virtual Experience Series 2023: 15 June, Session 310, Folding Change Management into Product Delivery, Speaker Kimberly Nix
7. Prosci Images and content: <https://www.prosci.com> (preserve prosci IP, prosci owns trademarks to the 3 phased methodology, PCT model, adkar, people/change/results)
8. Photo Source Slide 30: <https://www.liquidplanner.com/blog/how-to-fix-a-troubled-project-by-falling-back-on-the-fundamentals/>
9. Prosci Images and content Slide 7: <https://www.prosci.com> (preserve prosci IP, prosci owns trademarks to the 3 phased methodology, PCT model, adkar, people/change/results)
10. Photo Source Slide 7: https://nichq.org/sites/default/files/inline-images/nichq_change_management_graphic.png;
<https://nichq.org/approach>
11. PMBOK Guide, Sixth Edition

