



VS



**PMI
Ghana
Chapter**





Introduction

Who Am I



Ron Leeman



I am the Owner/Founder of the Highway of Change

I have been in the “business of change and transformation” for over 4-decades

I have worked across the length and breadth of the UK, across many European countries and Internationally in excess of 20 industry sectors and have “change managed” over 25 different technology solutions

I am a Consultant, Trainer, Blogger, Speaker, Author, a Coach & Mentor and Trusted Advisor on all matters related to “change and transformation”

In June 2012 I was presented with a “Change Leader of Tomorrow” Award by the World HRD Congress in recognition of my “remarkable progress in initiating changes enough for others in the same industry to follow my example”

I am also the Founder of the Institute of Change and Transformation Professionals Asia (ICTPA)





Workshop Content

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Some Context

2

What is the difference

3

Roles and Responsibilities

4

Personal Examples of Roles & Responsibilities

5

The case for Integration

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 Project Management Institute.
and
Change Management

7

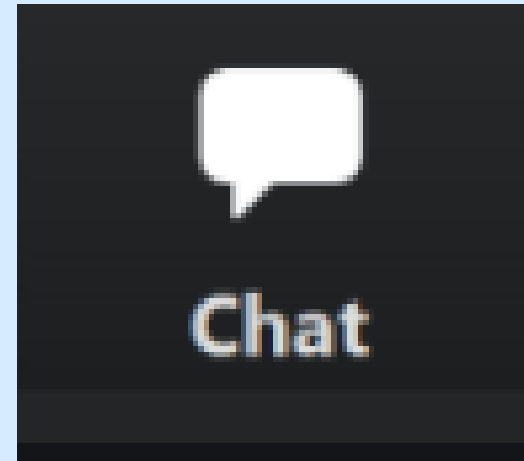
Project Success & Failure



Q&A Protocol



If you have any questions please record them in the



function and I will go through them at the end of the session

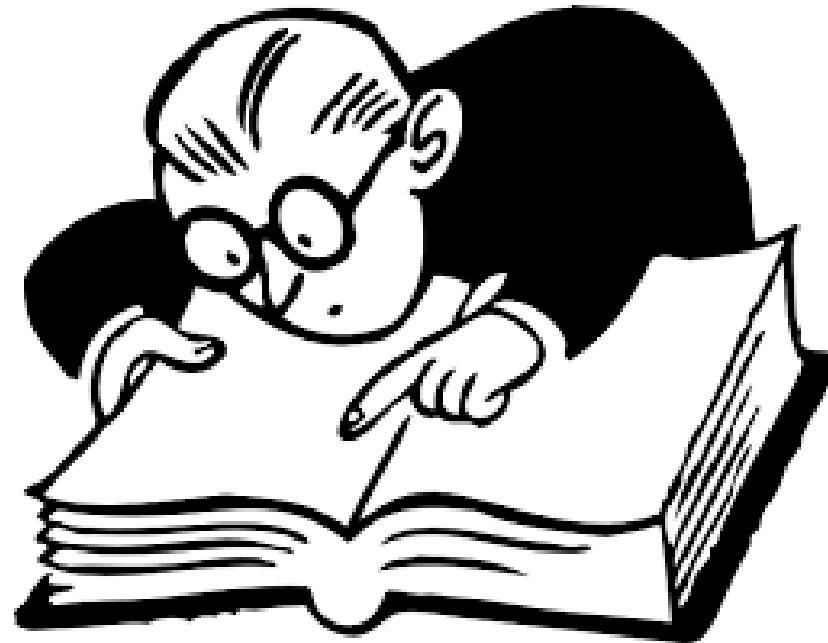


Are you ready?





Some Context





From which perspective

Change Manager





An ongoing debate

It is an ongoing debate!



PM?

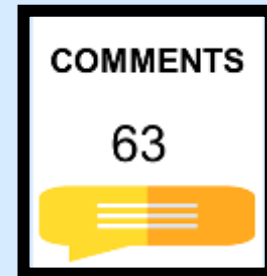
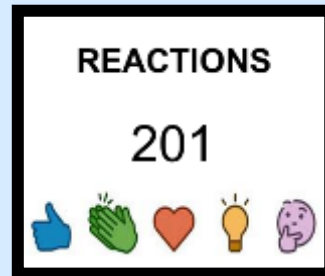
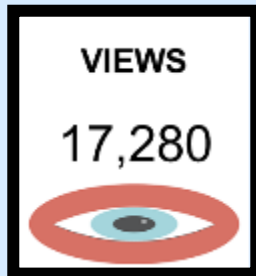


CM?



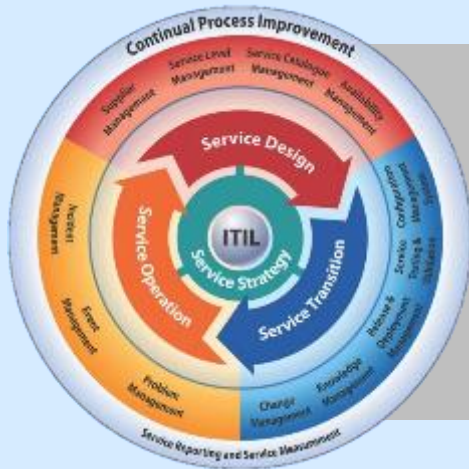
LinkedIn Article

I first wrote about this via an article published on LinkedIn in August 2014





Which type of Change Management



Change Management (Project) i.e. managing Change Requests/ITIL/ITSM ...
a process where project changes are identified, documented, analyzed and decided (approved or rejected)



Change Management (Organisational) i.e. managing the People Side of Change ...
a structured approach to transitioning individuals, teams, and organizations from a current state to a desired future state



All Projects

Regardless of type all projects are



projects



What is the difference





Sometimes not aligned

PM



CM





PM & CM ... what is the difference

Traditionally Projects are run by Project Managers using a structured Project Management approach ...

... but there is a fundamental difference between PM & CM

Project Management is about **installation** ...
it focuses on a plan built around events and timelines with the aim of getting from a current state (no installation) to a future state (installation achieved)



Change Management is about **adoption** ...
it focuses on the people aspects of the change with the aim of getting a critical mass of people to be committed to the change involved, to learn new behaviours and to sustain them willingly



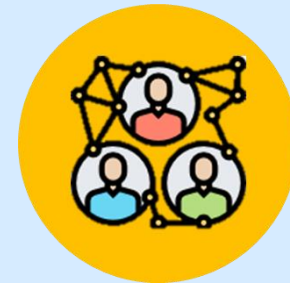


PM & CM ... what is the difference



Project Management

involves the use of people, processes and methodologies to plan, initiate, execute, monitor and close activities. It is designed to meet an organization's project goals, and hopefully overall strategic objectives



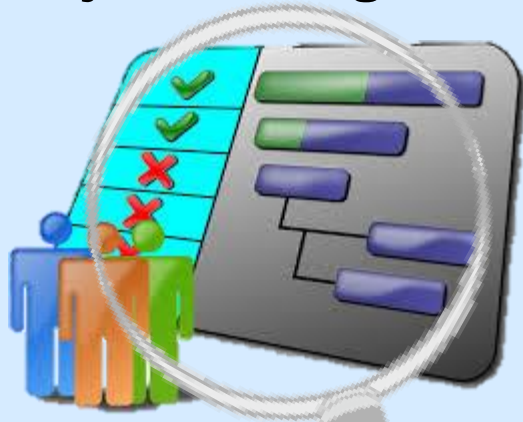
Change Management

involves people, processes and tools to effectively help organizations manage all the changes that occur, whether as a result of project initiatives, or other factors that might impact the business



PM & CM ... what is the difference

Project Management



focuses on tasks and activities required to create and implement the technical solution and that it is designed, developed and delivered effectively



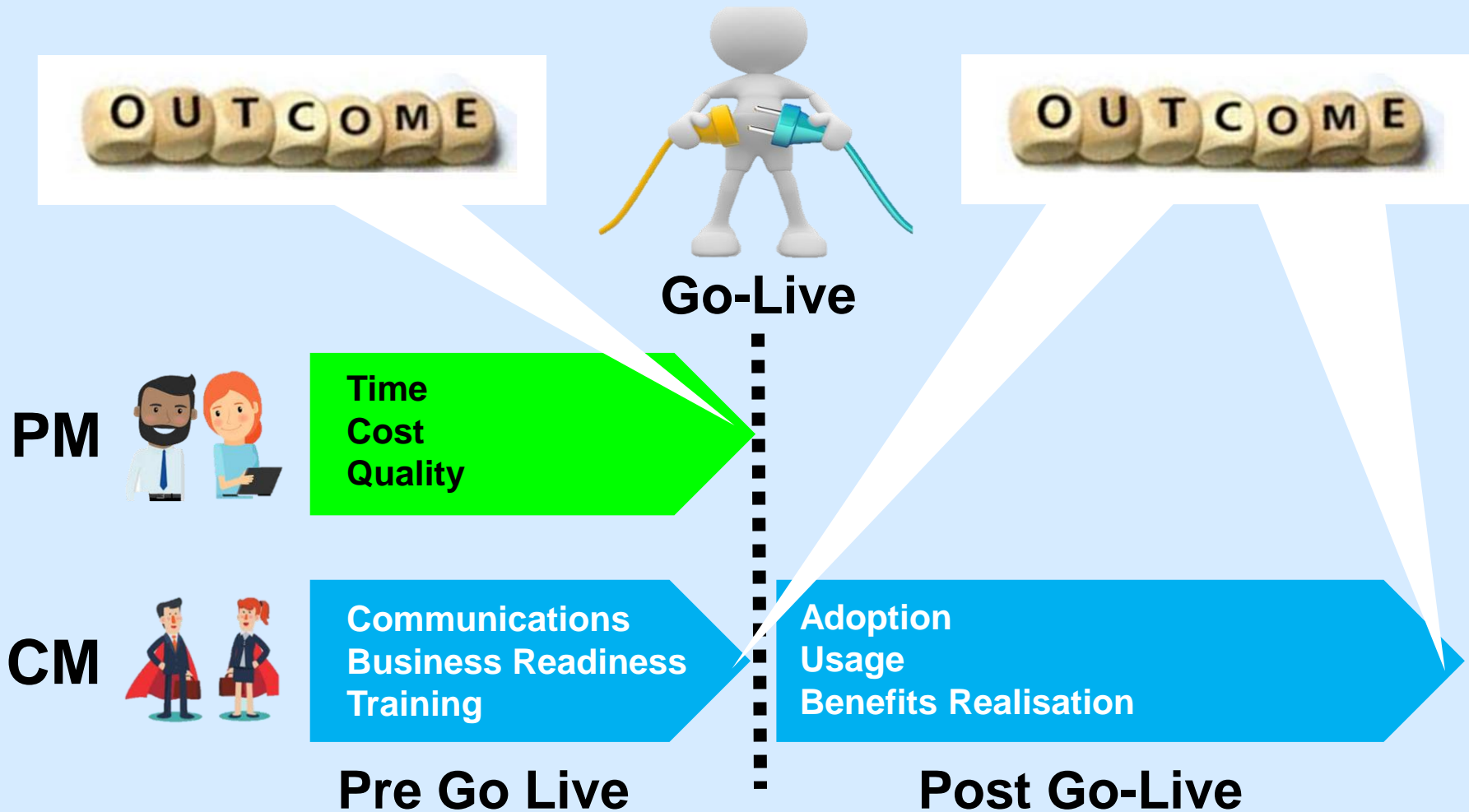
Change Management



focuses on employees impacted by a project or initiative to ensure that they embrace, adopt and use the solution associated with the change

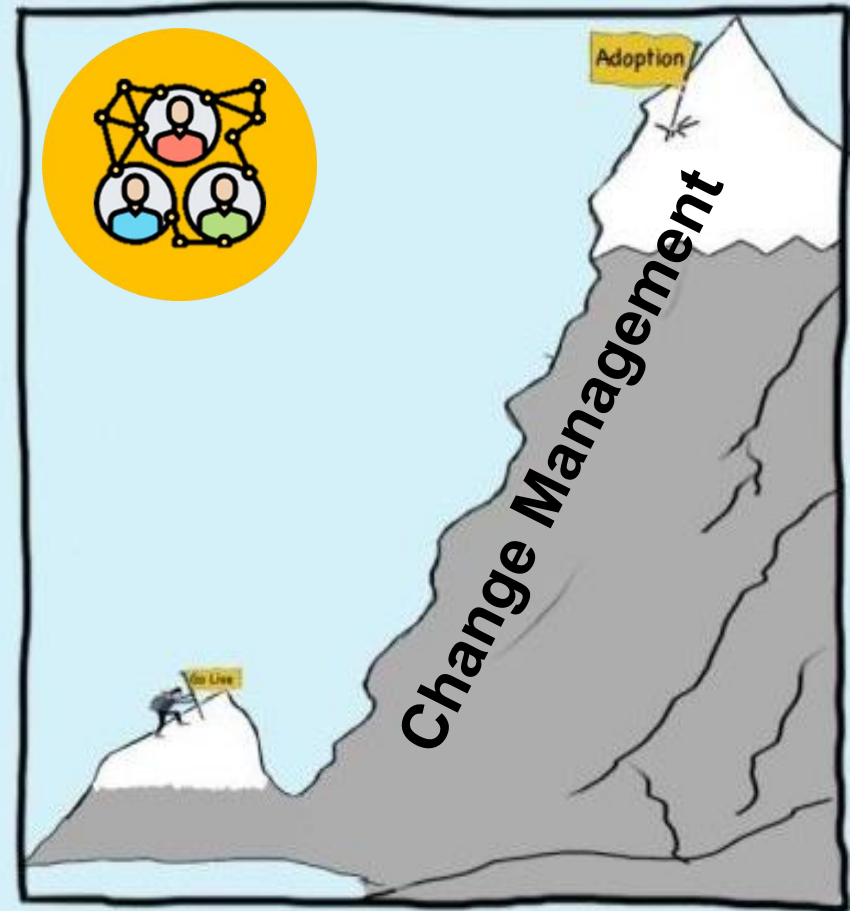


PM & CM ... what is the difference





PM & CM ... what is the difference





PM & CM ... what is the difference

I recently read a 2019 blog by a Susanne Madsen who is a Project Leadership Coach called “What are the 3 biggest mistakes that Project Managers make?”



Mistake #1: Managing tasks and events at the expense of leading people

The most common mistake Project Managers make is that they are more concerned with tasks and events than with people and the human impact of change – often unknowingly. Many Project Managers have a rational, logical and analytical way of thinking.

1

They are good at analysing facts, calculating duration, coordinating activities and making rational decisions

2

They are task-focused and see their primary role as delivering what the customer has asked for within the agreed parameters of time, cost and quality

3

Their strength is in executing and following someone else's vision and specification rather than helping to define it



PM & CM ... what is the difference

Let's start with a very simple view ...

Project Management
prepares the



Solution

for the organization

Change Management
prepares the



Organization

for the solution



PM & CM ... what is the difference

Next a little more detail ...

	PM	CM
Prioritises	SOLUTION	PEOPLE
Manages	SCOPE TIME QUALITY BUDGET	ADOPTION RESISTANCE CULTURE ENGAGEMENT
Outcome	SOLUTION DELIVERY	PEOPLE ADOPTION



PM & CM ... what is the difference

And now a bit more detail ...

1

Change Management is only an idea unlike Project Management which is the development of the idea

2

Project Management has a timeline while Change Management can go on for however long is necessary

3

Change Management needs many ideas to make one vision while Project Management just needs one vision

4

Change Management is structuring the vision while Project Management is creating milestones

5

Project Management already has a defined goal while Change Management goals can change at any second



PM & CM ... what is the difference

Project Manager

A structured hierarchy

Plans resources and data

Certainty and predictability

Up to go-live

Delivery to time,
cost and quality

Facts and figures

Tangible

Drives a straight line
between A and B

Structured

PERSPECTIVES

SEE THE ORGANISATION AS

IS EXPERT AT DEALING WITH

PERFORMS AT THEIR BEST FACED WITH

CONCENTRATES ON A TIME HORIZON OF

ARE REWARDED FOR

DEALS WITH

DELIVERABLES ARE PRIMARILY

TAKES AN APPROACH WHICH

PRIMARILY NEEDS TO BE

Change Manager

A loosely connected
group without structure

People and behaviours

Ambiguity and unpredictability

Well beyond go-live

Business readiness
and user adoption

Perceptions and emotions

Tangible & Intangible

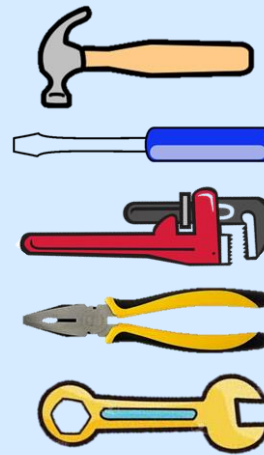
Navigates a path of
least resistance

Flexible



PM & CM ... what is the difference

Change Methodology
Readiness Assessments
Communication Plans
Sponsor Roadmaps
Coaching plans
Usage & Adoption
Training Plans
Resistance Management
Reinforcement Mechanisms



**T
O
O
L
S**

Statement of Works
Project Charter
Project Initiation Document
Business Case
Work Breakdown Structure
Gantt Chart
Budget Estimations
Resource Allocation
Scheduling and Tracking

Change Management

Project Management

Roles and Responsibilities





CM vs PM – Roles and Responsibilities

Project Management



Defining the project scope



Scheduling work tasks



Managing issues & risks



Managing resources



Cutover & delivery

Change Management



Project communications



Stakeholder management



Business readiness



Training management



Usage & adoption



CM vs PM – Roles and Responsibilities

Leaders often undervalue the distinct roles of these two management subjects ... PM is a business decision enabler while CM is a people behaviour enabler. They have job roles and responsibilities that require different skill-sets e.g.:

Change Management

Works on change sustainability and integration

Communicates progress and impact

Manages people-side risk

Focuses on people-side strategies

Follows change management lifecycle

Manages and motivates people



Project Management

Drives solution delivery

Focuses on time, cost, quality and scope

Manages technical risk

Manages the project from start to end

Follows project management lifecycle

Delivers project solution



Personal Examples of Roles & Responsibilities



CM & PM ... Roles & Responsibilities Ex (1)



IT Change & Communications Manager (Head Office Move)



GlaxoSmithKline

Developed and delivered all IT related Communications and Change for their HQ relocation in Singapore

Change Management responsibilities:

- Developing the Change Strategy
- Learning Planning & Delivery
- Communications Planning & Delivery
- Stakeholder Engagement
- Change Impact Analysis

Project Management responsibilities:

- Managing the Project Plan
- Project and Milestone Reporting
- Infrastructure Planning & Implementation
- Risk & Issue Management
- Budget Management
- Technical Change Management

CM & PM ... Roles & Responsibilities Ex (2)



Business Change Manager (SAP Implementation)



Managed all
Communications,
Training and Business
Readiness activities
for their Asia SAP
Implementation

Change Management responsibilities:

- Business Readiness Monitoring
- Communications
- Training Development
- User Acceptance Test Management
- Process and Organisational Design
- Stakeholder Management

Project Management responsibilities:

- Managing the Plan
- Managing the Project Team
- Gap Fit Analysis
- Data Management & Cutover
- Training Planning
- Cutover and Go-Live Planning

CM & PM ... Roles & Responsibilities Ex (3)



Business Process Change Manager (Target Operating Model)



Developed a new
Target Operating
Model for their new
SAS BI & Analytics
Technical
Infrastructure

Change Management responsibilities:

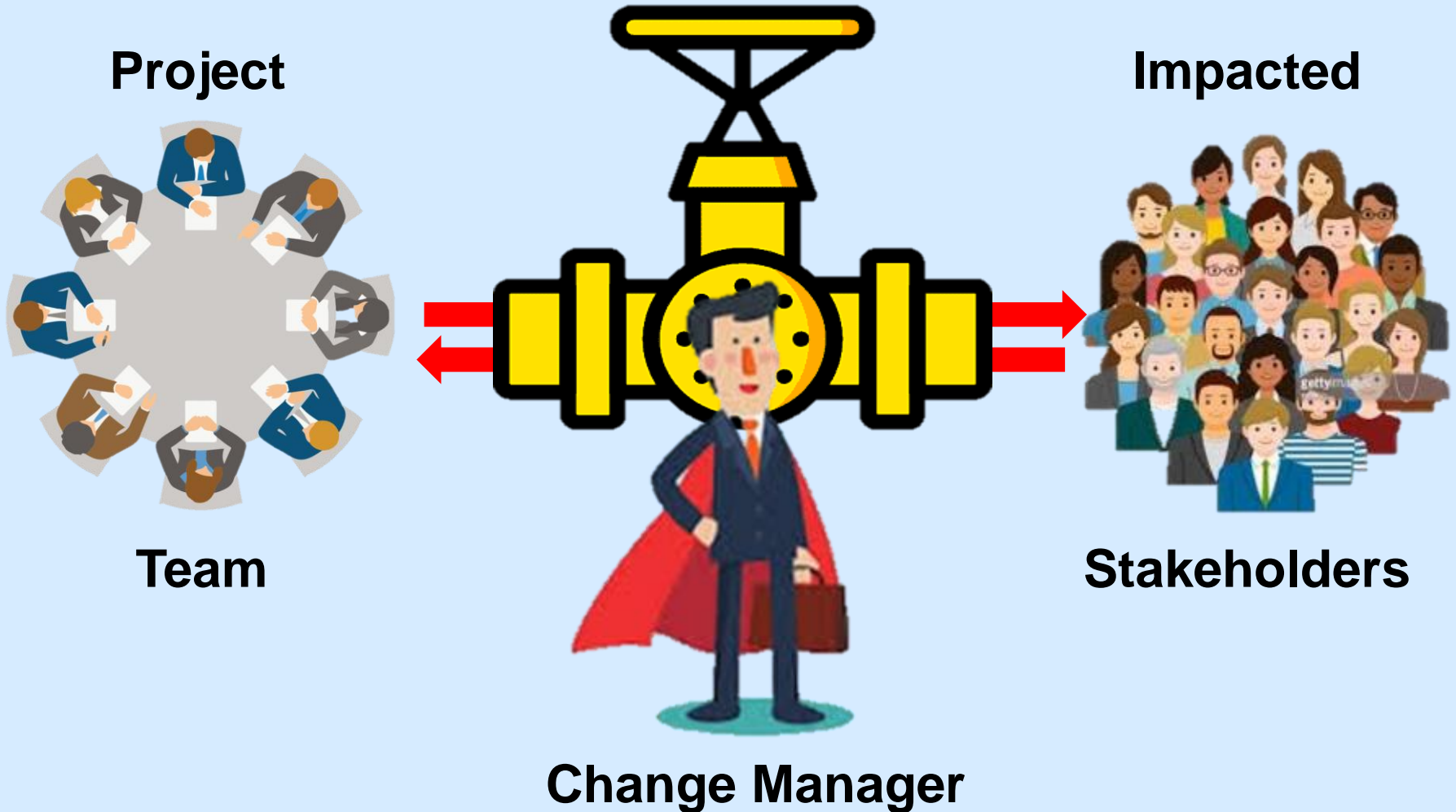
- Organisational Realignment
- Business Process Capture
- Stakeholder Engagement
- Communication
- Education & Training
- Business Readiness Monitoring

Project Management responsibilities:

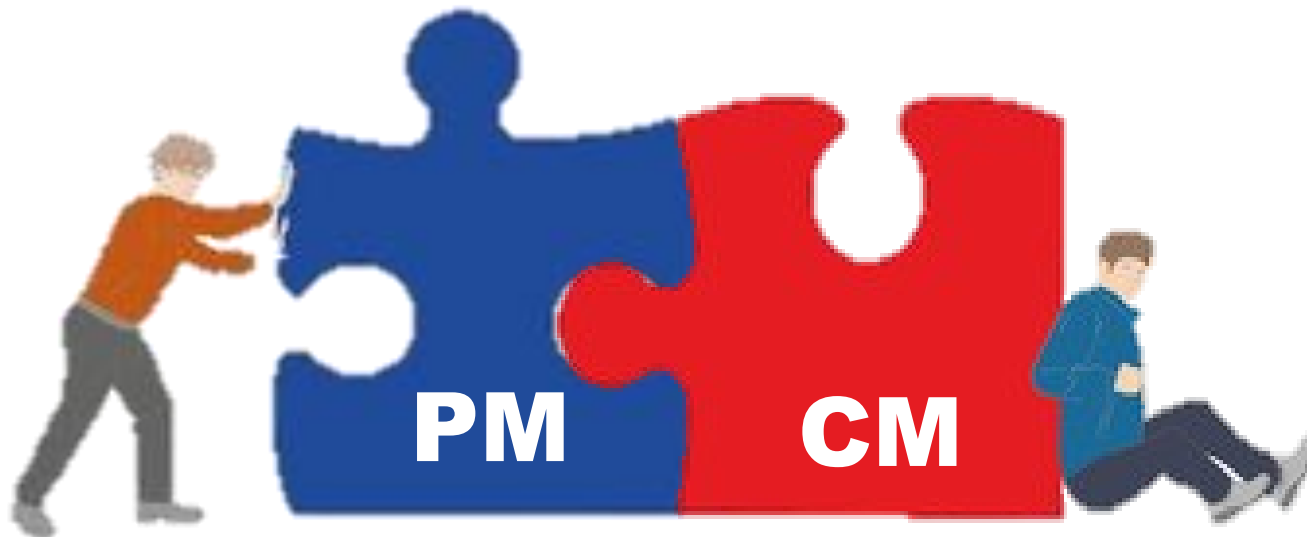
- Managing the Project Plan
- Project Governance & Reporting
- Infrastructure & Environment Planning
- Risk & Issue Management
- Business Requirements
- Code Management



The Conduit between Project & Business



The case for Integration





CM & PM ... the case for Integration

Project Management and Change Management each contribute a critical ingredient to a successful change event though they vary in terms of focus and approach



Understanding how each discipline works alongside the other is the first step in achieving a unified value proposition and the strongest foundation possible for your change initiatives



CM & PM ... the case for Integration

Both Change Management and Project Management support moving an organisation from a current state (how things are done today), through a transition state to a desired future state (new processes, products, systems, organization structures or job roles).

Change Management

As Is



To Be

Project Management



CM & PM ... the case for Integration

Integration begins with role clarity but there is a lack of understanding between the role of Project Manager and Change Manager in many organizations. Besides confusion around role clarity, there are many other barriers to project and change management integration that you should be made aware of



Even now the discipline of Change Management still seems to be in its infancy stage by comparison to Project Management so Change Management professionals are in the early phases of converting non-believers



Since the role of the Project Manager has expanded significantly most do not have the capacity or capability to learn Change Management



Change Management is not easily measured since the results are often intangible so executives who control budgets struggle to justify the expense and fail to get behind Change Management efforts

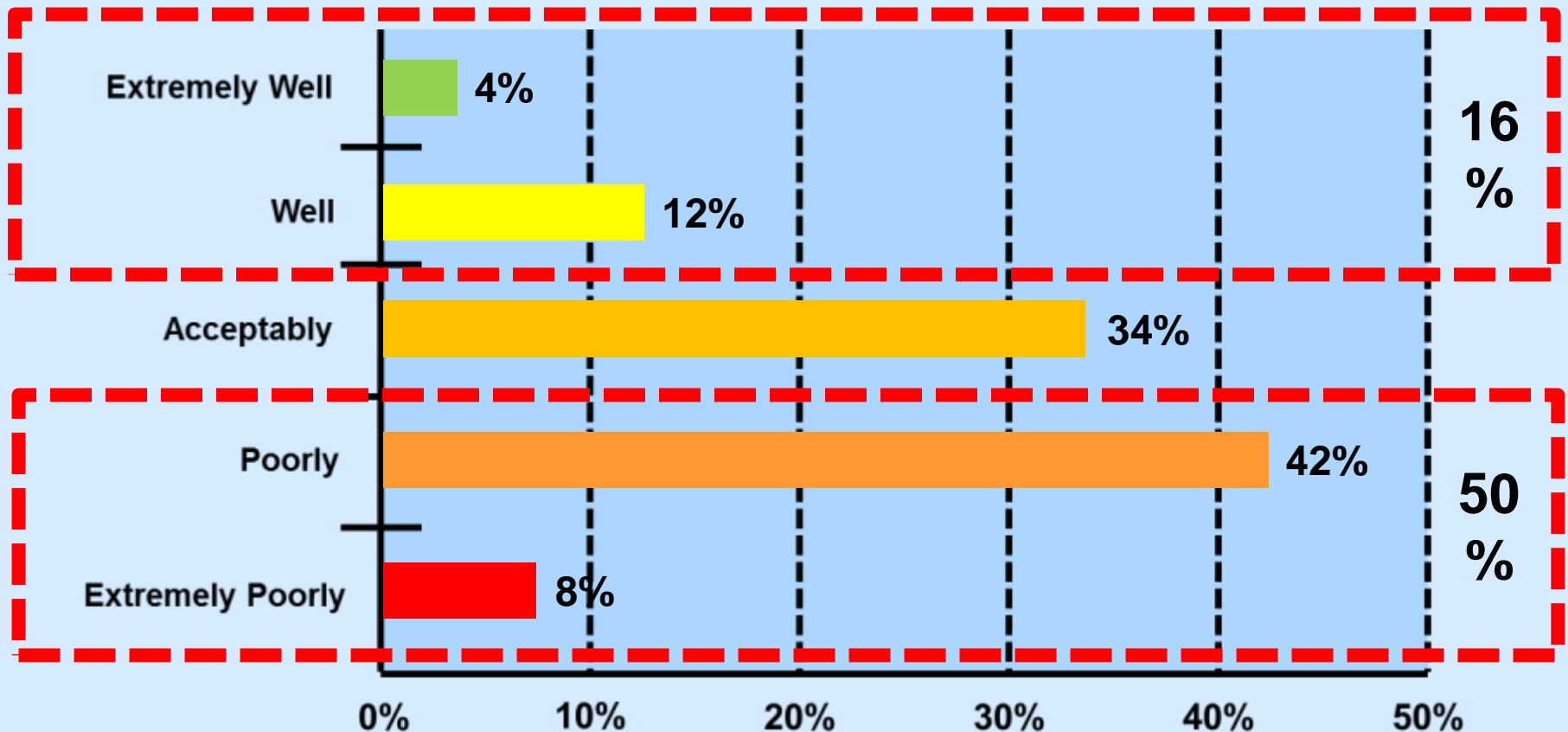


While Project Management has been engrained deeply within the fabric of most organisations, Change Management is still struggling for a seat at the C-Suite table



PM & CM ... the case for integration

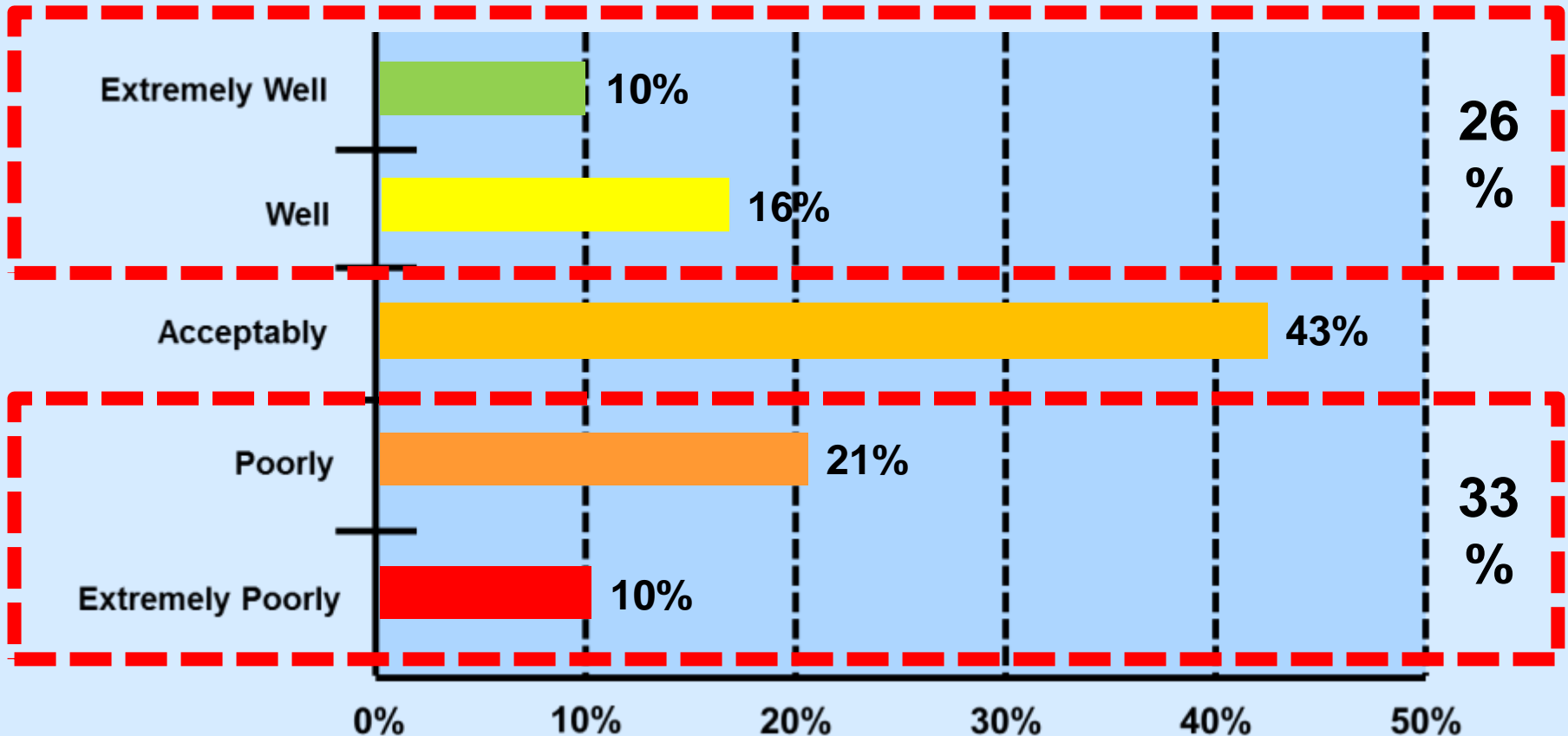
How well is Change Management & Project Management integrated in your Organisation
(Data from Prosci Change Management Webinars)





PM & CM ... the case for integration

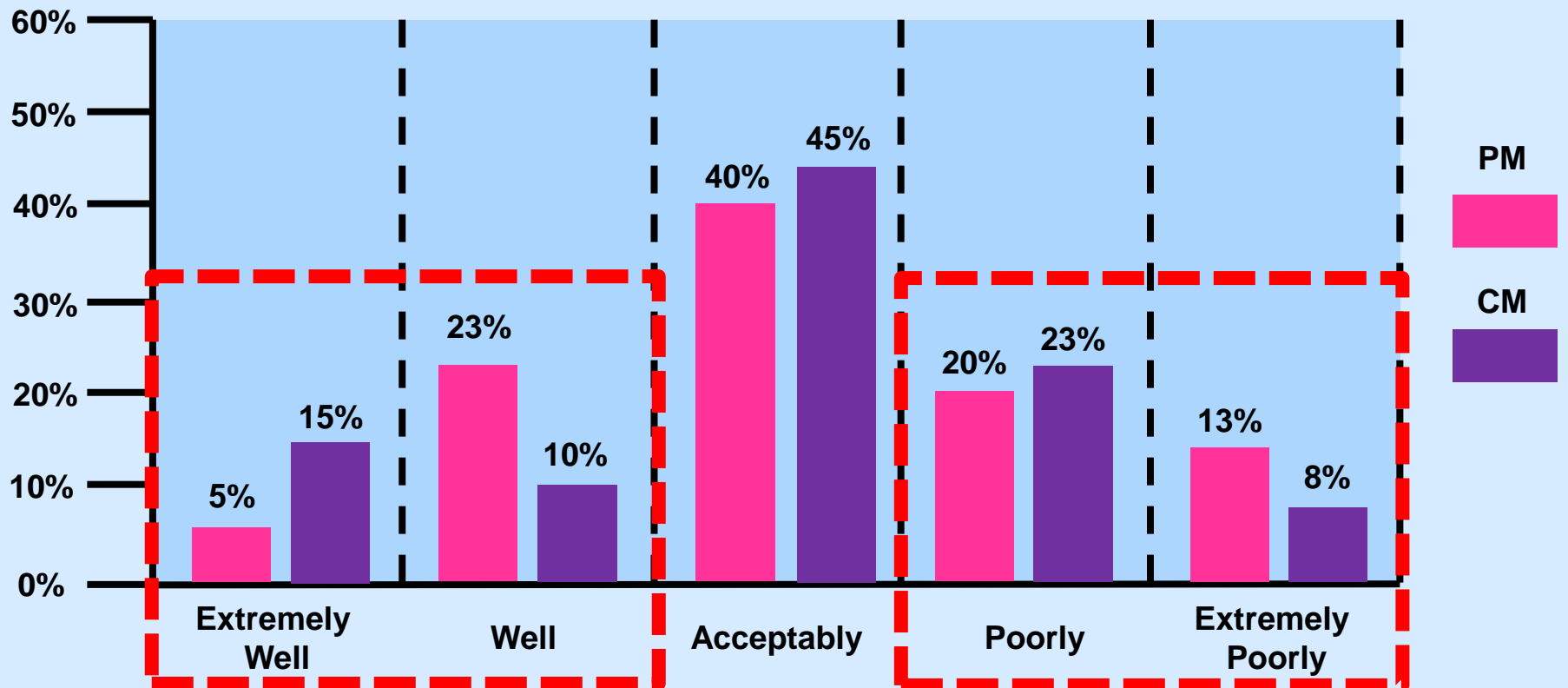
How well is Change Management & Project Management integrated in your Organisation
(Results from The Highway of Change's 2021 Survey)





PM & CM ... the case for integration

How well is Change Management & Project Management integrated in your Organisation
(Results from The Highway of Change's 2021 Survey - segregated between Project Management and Change Management)





PM & CM ... 5 Steps to Integration



It starts with education ... informing leaders, stakeholders, project managers and project team members that the benefits of change management is critical to project success



Set expectations around how change work gets done and acknowledge that the discipline of Change Management is based on facts and insights gathered through data gathering tools and processes



Use consumer-friendly and basic language when describing the change process and work efforts because the process for Change Management may be viewed as unnecessary to the untrained eye



Ensure Project Management and Change Management synergy by presenting a unified front to project leadership, stakeholders and team members



Collaborate with the Project Manager and key stakeholders to embed a change methodology and subsequent deliverables within a master Project Plan and Status Reports



PM & CM ... the integration Conundrum

But there is a conundrum ...

Can just one individual be both a *Project Manager* and a *Change Manager*?



or

Should they be two different individuals?





PM & CM ... the integration Conundrum

A CM and PM model of working in partnership



is the way forward

A PM with a responsibility for Change Management or conversely a CM with a responsibility for Project Management just puts too much pressure on an individual and they may not necessarily have the right experience and skill-set to manage both elements ... but of course it depends on things like project size, impact and budget to name but a few



CM & PM ... CIO

How Project Managers and Change Managers work together?

When projects are initiated, they create a significant amount of undue stress on stakeholders and employees in general. While Project Managers maintain complete focus on overall project objectives with the goal of ensuring stakeholder value, Change Management professionals should not only attend project meetings, but also be an integral part of the project team.

CIO

Collaborating provides a holistic approach to strategy and ensures the impact to people can be sufficiently addressed, to reduce unnecessary stress and anxiety, and also create a smooth transition in terms of processes and acceptance during and long after the project is complete.

Overall, organizations should encourage Change Management professionals and Project Managers to work closely together to ensure project efforts and the resulting change are sufficiently addressed to reduce the impact on its people and level of product and service delivery.



CM & PM ... Logic 20/20

From a Dec 2020 article called “Change Management trends to watch in 2021” by Mary Beth Gibson who is the Director of Program Management for

The logo for 'Logic 20/20' features the word 'LOGIC' in blue, followed by '20/20' where the first '20' is in white on a blue background and the second '20' is in white on an orange background. Below this, the tagline 'experience a difference' is written in blue.

LOGIC 20/20
experience a difference

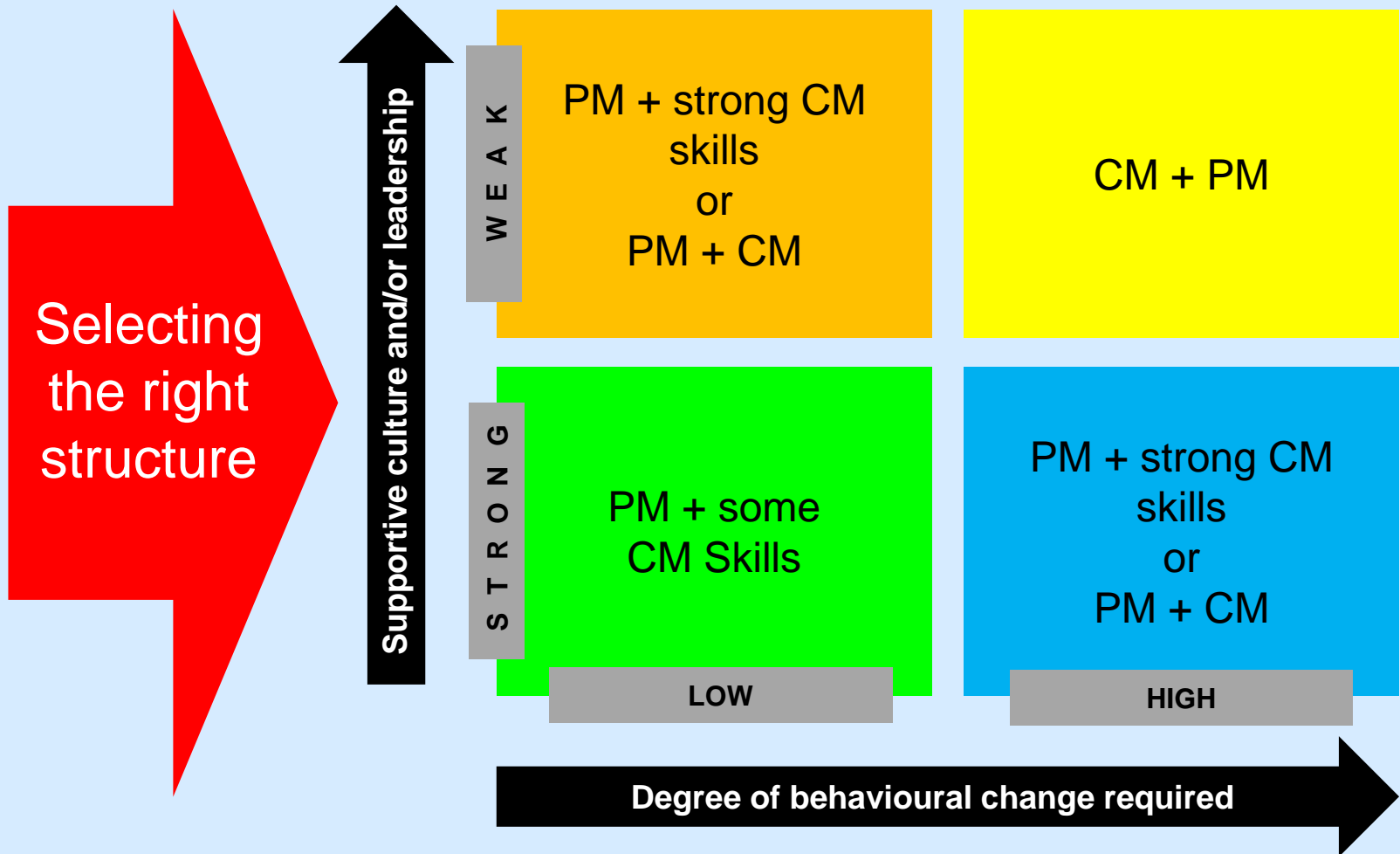
Trend 3: Change-driven Project Management

The earlier Change Management can be rolled into project planning, the greater the project's overall chances of success. Especially in our current environment, where the pace and volume of change requires special consideration, an early start enables the change management team to build some flexibility into their scheduling.

Project Managers would do well to address Change Management as early as possible and to work with the team on weaving communications and other measurable tasks into the schedule even as other aspects of the project are still progressing.

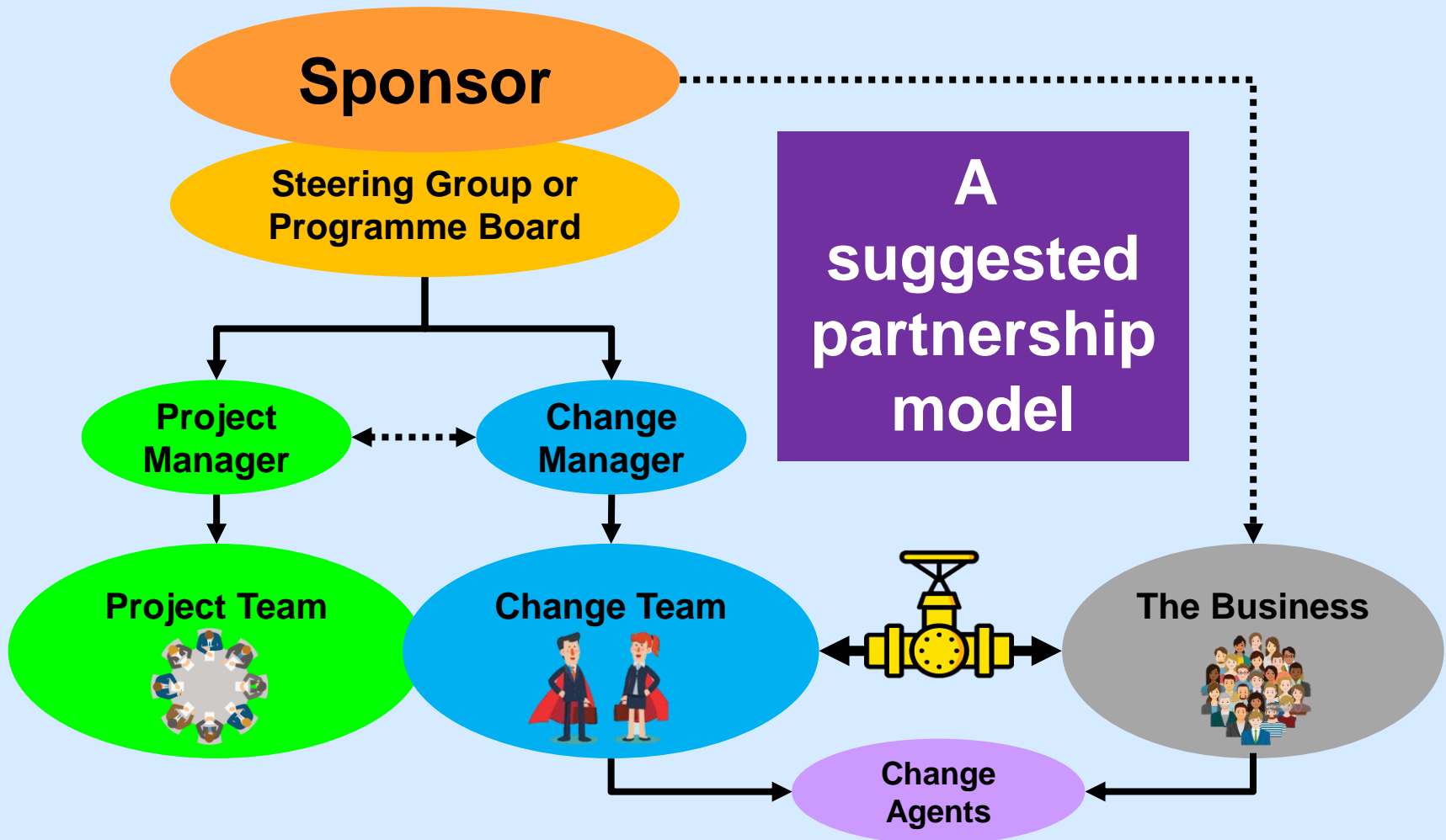


CM & PM ... how to choose





CM & PM ... a suggested model





**Project
Management
Institute.**

**and
Change Management**



Paper presented @ PMI Global Congress 2005



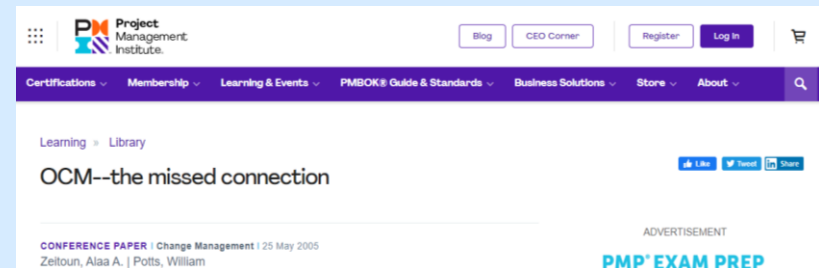
Abstract

Change management needs to become part of all projects, as well as an integral part of project team building practices.

Change Management and Projects

Change management is a coherent part of the implementation effort as it unifies all implementation services into a single comprehensive solution

Paper presented @ PMI Global Congress 2005



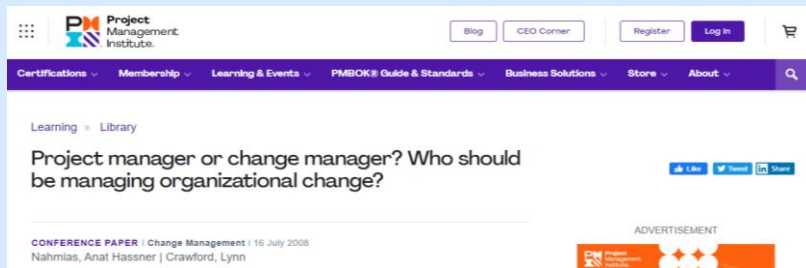
Why is OCM important?

No matter what the project or program type is, it has a direct or indirect impact on the organisation either implementing or receiving the results.

At the core, OCM is about managing the change that is the result of the project or program. Organisations continually have to change to survive, to grow or to excel.



Paper presented @ PMI Research @ Conference 2008

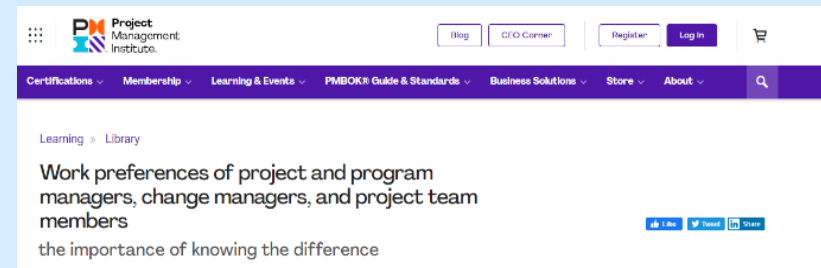


The Change Manager as Implementers of Change

The role of the change manager has emerged from a different disciplinary background to that of project and program managers.

The change manager is responsible for the management of change with a focus on the human side of the change. In practice, this is an emerging role and with responsibility for the management of any type of organizational change.

PMI Conference Paper dtd 22 October 2011



Organizational Change Projects are Different

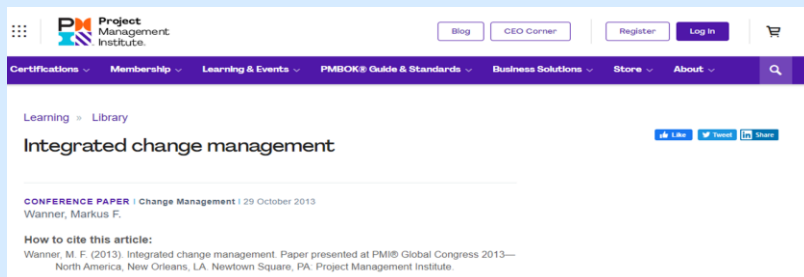
It is likely that if the individual or team responsible for the change has come from a technical background or even a project management background, they would have technical skills and project management skills but not necessarily the skills to implement organizational change.

Project Management techniques are not always conducive to achieving organizational change

PMI Papers/Research



PMI Paper presented @ PMI Global Congress 2013



Integration of Project and Change Management

The supporting processes “project management” and “change management” are crucial to be successful. Project Management, the scope (functional content of the change) and Change Management are to be integrated.

The Change Management of a project must start in the period of project initiation and continue after project closure.

PMI Research dtd June 2015

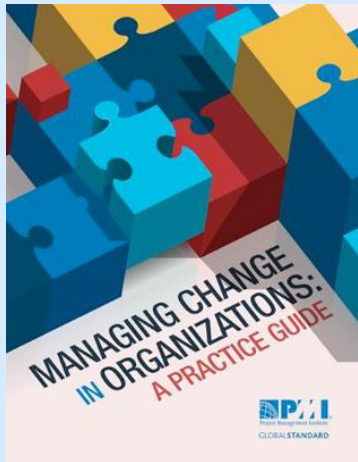


Recommendations for Practice ...

There is lack of clarity concerning the relationship between and among change, project and program roles.

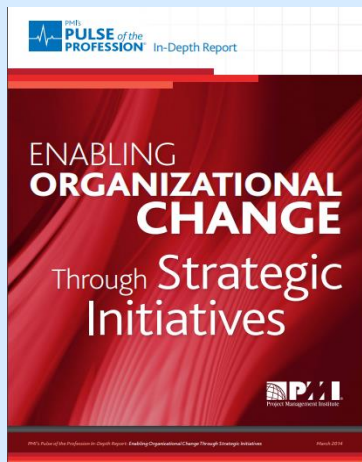
Training, education and development of project practitioners at all levels should go beyond the current PM standards and encompass introduction to and guidance in the use of change implementation practices

PMI Practice Guide/Pulse of the Profession



Managing Change in Organizations: A Practice Guide (2013) it says: Organizational change projects are the fourth most common type of project undertaken, but only 20 percent of organizations adopt a formal organizational change management practice

Studies show that organizations achieve higher success rates by using standardized portfolio, program and project management techniques in concert with rigorous change management approaches



Enabling Organisational Change (2015) Through Strategic Initiatives it says: Projects and programs by their very nature create change. To successfully implement organizational strategy, companies need project and program managers with the skills to drive and navigate change, while ensuring that those changes are strategically aligned to business goals.

The success or failure of a change initiative is not just about initiating, planning, monitoring, executing and evaluating the project that will drive the change.



New PMI Examination Content Outline

Task No		People Domain - 42%
Task 1	Manage Conflict	
Task 4	Empower Team Members & Stakeholders	
Task 5	Ensure Team Members/Stakeholders are adequately Trained	
Task 7	Address and Remove Impediments, Obstacles & Blockers	
Task 9	Collaborate with Stakeholders	
Task 10	Build Shared Understanding	
Task 13	Mentor Relevant Stakeholders	

Task No		Process Domain - 50%
Task 2	Manage Communications	
Task 4	Engage Stakeholders	

Task No		Business Environment Domain - 8%
Task 2	Evaluate and deliver Project Benefits and Value	
Task 4	Support Organisational Change	

Suggested Relevant CM Domain
Resistance Management
Stakeholder Management
Stakeholder Management & Training Management
Resistance Management
Stakeholder Management
Communications & Engagement
Stakeholder Management

Suggested Relevant CM Domain
Communications & Engagement
Stakeholder Management

Suggested Relevant CM Domain
Benefits Management
Culture Change & Impact Analysis

Project Success & Failure

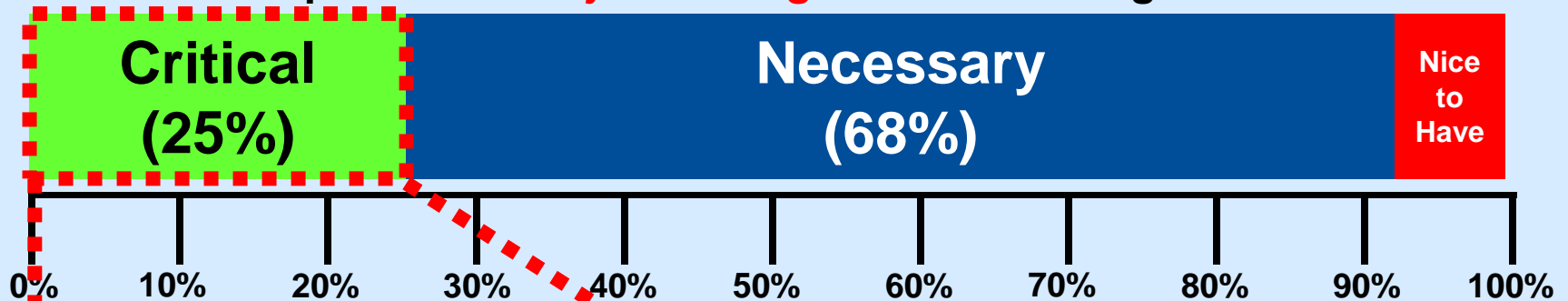




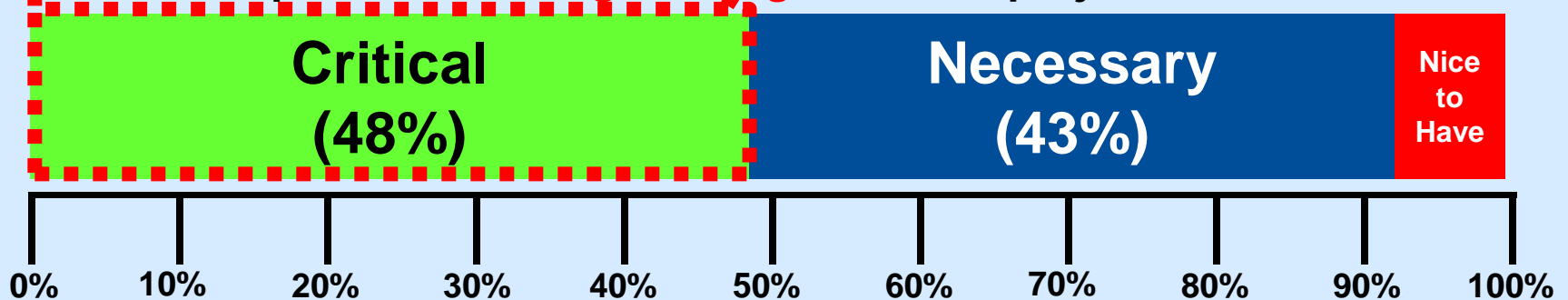
Project Success & Failure

How important is Project Management and Change Management to project success (data from a LinkedIn survey by Beyond Strategy at least 8 years ago)

How important is *Project Management* to “change” success?



How important is *Change Management* to “project” success?

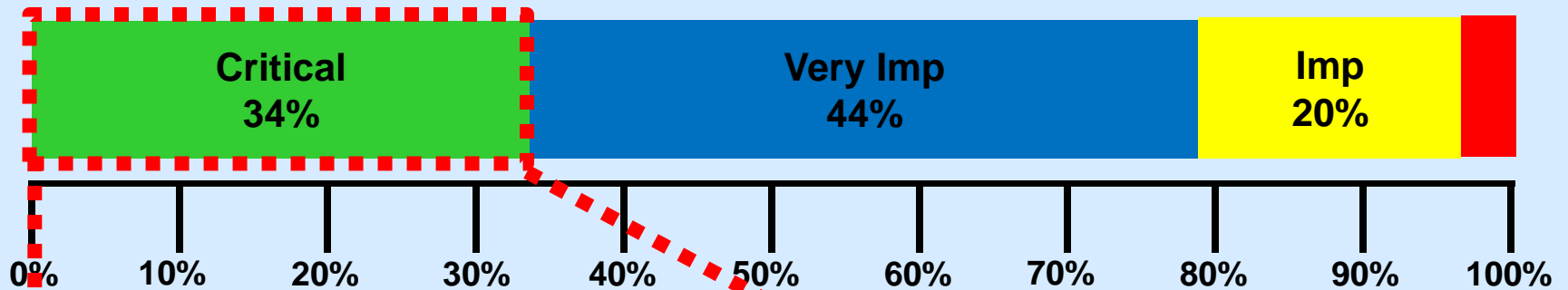




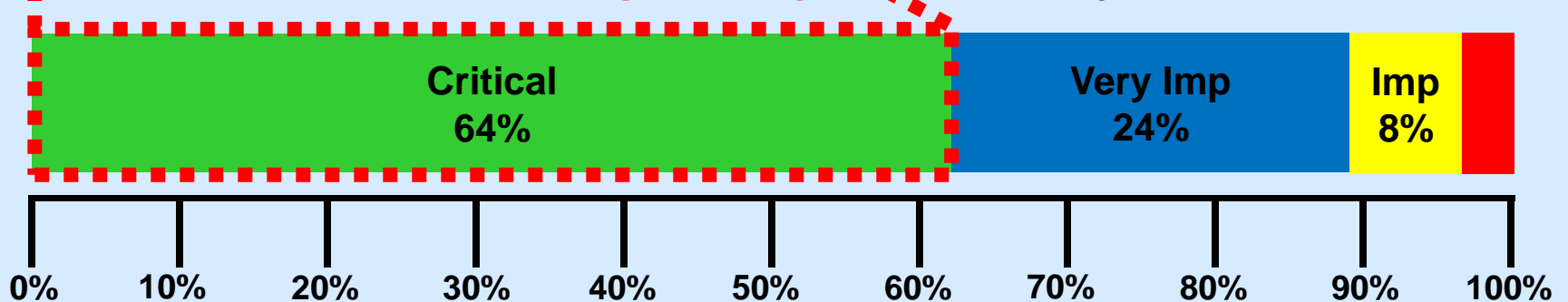
Project Success & Failure

How important is Project Management and Change Management to project success (data from The Highway of Change survey April 2021)

How important is **Project Management** to “change” success?



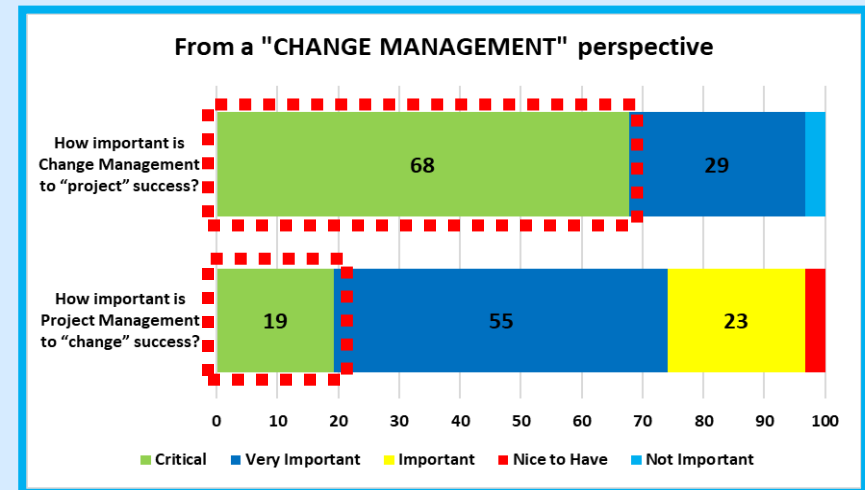
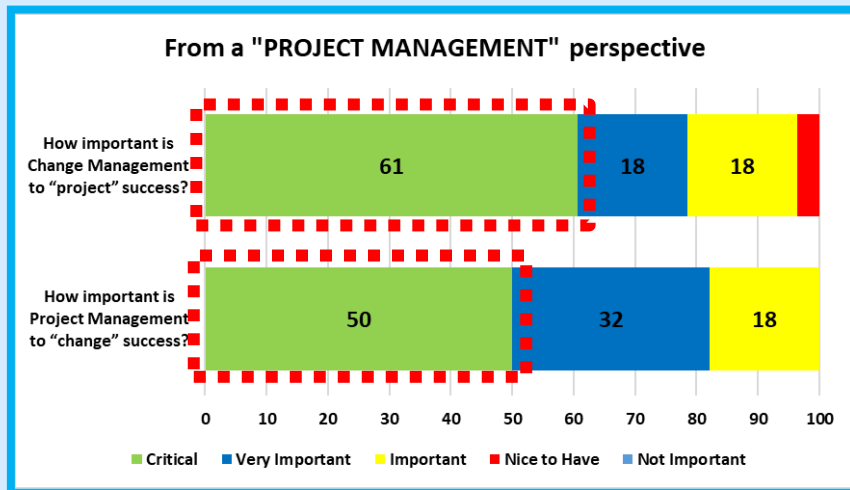
How important is **Change Management** to “project” success?





Project Success & Failure

I segmented my results to look at them from both a PM and a CM perspective and as you can see from the comparisons below:



The critical results for how important Change Management is to Project success from a PM perspective are relatively close but;

The critical results for how important is Project Management to Change success from a CM perspective are significantly different



Project Success & Failure

PROJECT MANAGEMENT

success measurement focuses on the technical side of change elements, primarily:



Time
Budget
Scope

Achievement of Outcomes *

* In some cases, intended results and outcomes take a secondary role behind time and budget targets.

CHANGE MANAGEMENT

success measurement focuses on the people side of change elements, including:



Adoption
Usage
Proficiency

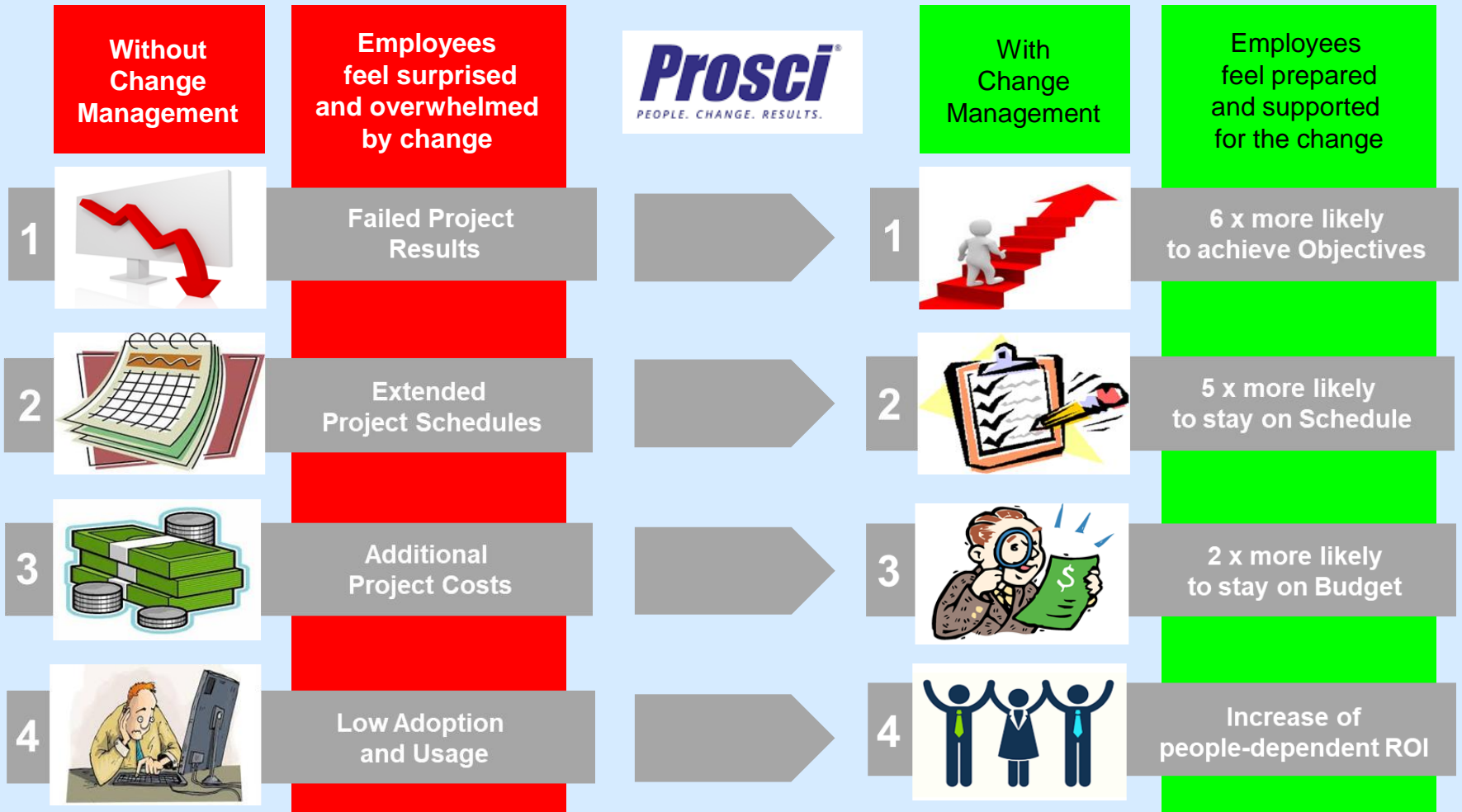
Achievement of Outcomes *

* Because results and outcomes depend on individuals adopting the change, this is a primary focus.





Project Success & Failure





**S
C
A
N**



**S
C
A
N**



The End

Any Questions

