



5 DIMENSIONS OF CHANGE MANAGEMENT AND PROJECT MANAGEMENT INTEGRATION

The disciplines of change management and project management understandably cross paths throughout the execution of a project or initiative. Each brings necessary and critical structure for effectively implementing change and realizing results. Below are four tactical dimensions along which integration can occur. A fifth dimension is also mentioned regarding a common objective and how integration around results and outcomes drives more effective integration in action.

DIMENSIONS OF INTEGRATION

Prosci has identified five dimensions of integration for change management and project management:

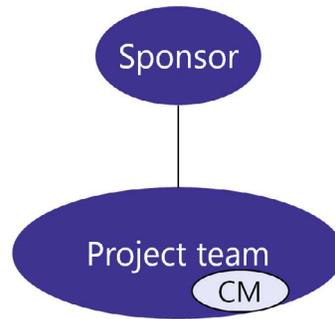
- People
- Process
- Tools
- Methodologies
- Results and outcomes

1. PEOPLE

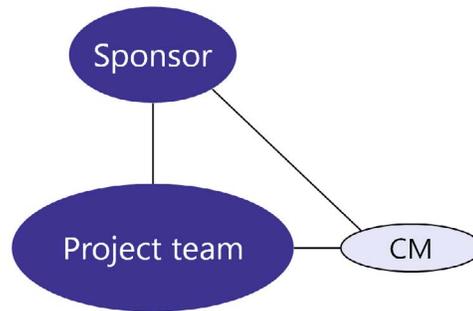
The people dimension of integration addresses who is doing the change management and project management work and how the relationship is architected. Prosci's latest research found that 76% of participants had a resource dedicated to change management. At the most basic level, that change

management resource can either sit on the project team (Team structure A below) or support the project team externally (Team structure B below). Benchmarking data from the 2016 *Best Practices* report noted 37% of participants used Team Structure A.

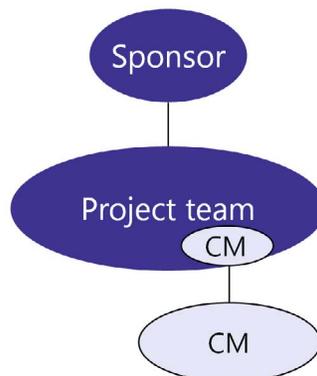
Team Structure A: Change management resource is inside project team



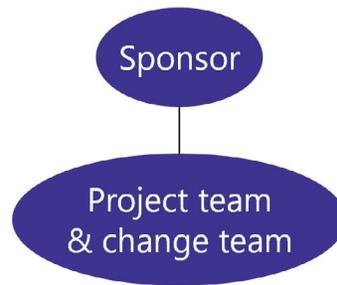
Team Structure B: Change management resource is outside both project team and sponsor



Team Structure C: Change management resource is both internal and external of the project team



Team Structure D: Change management and project management teams are the same



There are certainly advantages and challenges with each model. When the change management resource is part of the project team, there is a higher level of project knowledge, and responsibilities can be more easily integrated. When the change management resource supports the project team externally, the resource tends to have higher levels of access to the sponsor, more objectivity and an exclusive focus on change management.

The decision of which integration approach is likely based on the nature of the project and the norms in the organization. Whichever approach is taken, it is important to effectively define roles, responsibilities and relationships for the project management resources and change management resources.

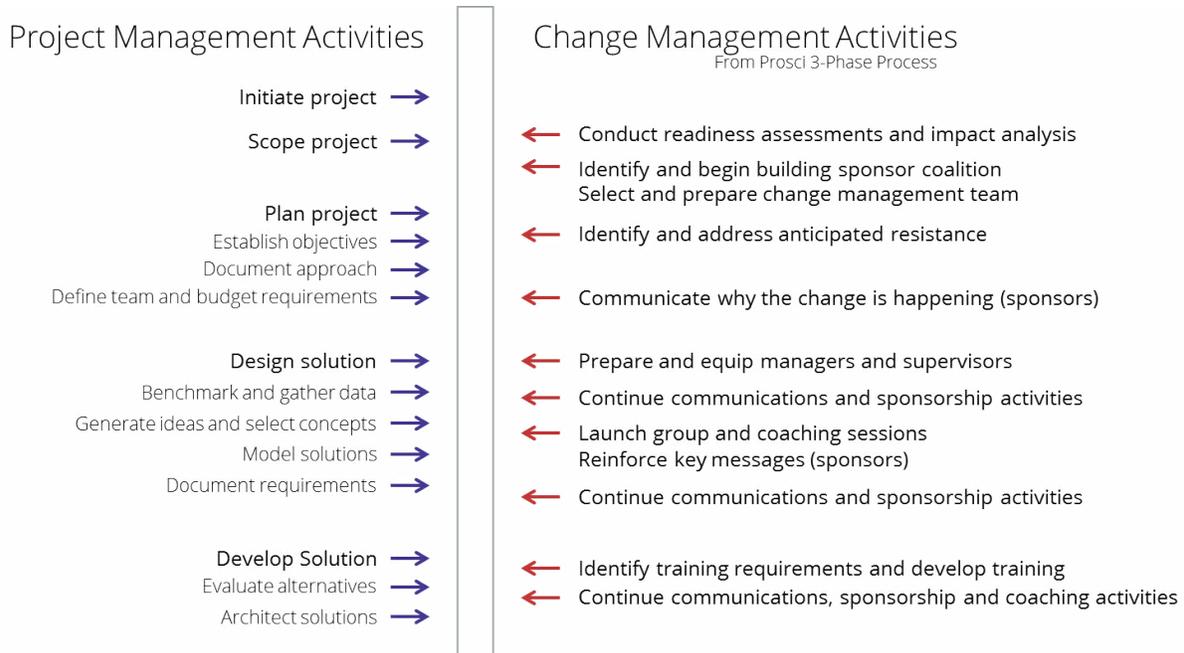
ACTION STEPS FOR INTEGRATING PEOPLE AND ROLES

- **Evaluate the nature of the change and the organization**
Once you've completed your evaluation, you can decide on the best architecture for the relationship between project resources and change management resources.
- **Clearly define roles, responsibilities and relationships**
By clearly establishing who will be doing what, you create better expectations and foster a better working relationship.
- **Be present and involved**
As the change management resource on the project, be sure that you are engaged and involved with project activities so change management has a presence.
- **Ensure sponsorship**
Regardless of the decision on structure, adequate sponsorship for change management gives credibility and support for the change management work and focus.

2. PROCESS

The process dimension of integration addresses how the activities of project management and the activities

of change management are brought together during the lifecycle of the project or initiative. Integration at the process dimension enables these two complementary disciplines to be more effective in sequencing work, aligning the timing of activities, and exchanging information that is crucial to project success. The image below shows, at a high level, how change management and project management activities can be integrated.



Integration of activities is enhanced by several factors:

- Beginning change management activities early in the project lifecycle, at the project initiation or project planning phases. The earlier change management is launched, the more effective the sequencing, aligning and exchanging of information will be.
- Using a process-driven approach with distinct deliverables for change management. If the change management approach is not process-driven with specific deliverables and milestones, it is very difficult to integrate with project management from both a practical and a credibility perspective.

ACTION STEPS FOR INTEGRATING PROCESS

- **Be structured in your approach**
The more rigorous, process-oriented and milestone-driven your change management approach is, the more easily it can be integrated with project management activities.
- **Create concrete deliverables**
As the change management resource, the more you can capture change management work in concrete deliverables, the more effectively you can integrate your work into the existing project team work.
- **Actively identify key points in time for integrating activities**
Throughout the project lifecycle, there are times where integration of activities is more critical and makes more sense. In each instance, you can be more complete and holistic by integrating these activities to ensure

that both the technical side and people side perspectives are addressed. Some of these include:

- Risk identification activities
- Solution design activities
- Project announcement activities
- System testing activities

3. TOOLS

Integration at the tool dimension focuses on the specific deliverables created by both the change management and project management disciplines. Some tools may not be integrated because they reside solely in one discipline or the other. However, there are numerous tools that are used by both project management and change management practitioners. For example, the communication plan and risk assessment are two tools commonly used in both disciplines. Integration on a tool dimension means creating a single tool plan that includes both technical side and people side aspects.

In a webinar on the topic of change management and project management integration, we asked participants which tools they had integrated. Tools identified included:

- After-action reviews
- Assessment tools
- Business case development tool
- Business requirements document
- Celebrations
- Charter statements
- Communications plan
- Cultural survey
- Deployment plan
- Design review
- Design workshops
- Focus groups
- Go-live readiness assessment
- Impact assessment and analysis
- Implementation plan
- Issue tracking, logs, management
- Kick-off meeting
- Knowledge transfer
- Lessons learned
- Metrics
- Organizational readiness plan
- Post implementation review
- Process mapping
- Project planning
- Prototyping
- Readiness assessment
- Requirement workshops
- Resources plan
- Risk assessment and analysis
- Risk management
- Schedule
- Scorecards/dashboards
- Sponsor updates
- Stakeholder analysis and assessment
- Stakeholder engagement plans
- Stakeholder map
- Stakeholder satisfaction analysis
- Statement of work
- Status reporting
- Support models
- Team building
- Testing
- Training strategy and plans
- User acceptance testing
- Work breakdown structures
- Work plan
- Work stream meetings

ACTION STEPS FOR INTEGRATING TOOLS

- **Identify specific tools that make sense for integration**

Some of the more common tools might include stakeholder analysis, risk identification and communication plans. All of these are common artifacts of project management and can easily be adapted to include a change management perspective.

- **Work with what the project team has already done**

There is no sense in alienating a project team by telling them that their communication plan is a telling plan and not a communication plan. Instead, your best approach is to show what change management can add to enhance overall effectiveness.

- **Ensure ownership is clear**

One risk of integrating at the tool dimension is that each may inadvertently give up accountability once both project management and change management are involved. Clarify early on who will still maintain and own the tool even when both perspectives are included.

4. METHODOLOGY

While integration along the people, process and tool dimensions occurs at the project level, integration of methodologies occurs at the organizational level. This dimension of integration moves one step up, creating a common and standard approach to project delivery that incorporates the organization's project management and change management methodologies.

Integration of methodologies involves decisions about when and how the methodologies interact and when they diverge. One of the biggest challenges is that change management work becomes too governed by project milestones and timing, taking away some of the change management workstream's needed ability to react to and adjust to how people are experiencing the change. An integrated methodology is often part of a greater strategy for institutionalizing change management, what Prosci calls enterprise change management.

ACTION STEPS FOR INTEGRATING METHODOLOGY

- **Select a common change management methodology**

Before you can begin to integrate at a methodology level, you will need to select an organizational standard change management methodology.

- **Be mindful of the tradeoffs**

When you integrate at the methodology dimension, there are some risks related to removing the responsive nature of change management. Take these risks into consideration and design your integrated methodology appropriately.

- **Manage the change of introducing an integrated methodology**

Many project managers in your organization may not be familiar or experienced with applying change management. They have also been successful with, and are accustomed to, using their current project

management methodology. When you introduce a new integrated methodology, be sure to apply change management to the change.

5. RESULTS AND OUTCOMES

Integration on the results and outcomes dimension stems from the notion that change management and project management are in fact complementary disciplines with a common objective. In the end, both project management and change management are approaches used to improve the performance of the organization by helping it reach a desired future state resulting from a project or initiative. This dimension is more focused on reaching a shared view of what success means and how each of the disciplines contribute to project success.

In many ways this dimension is where integration actually begins. When we can successfully integrate our view and definition of what we are trying to achieve, the rest of the integration elements begin to fall into place. Rather than an “us versus them” mentality, integration on the results and outcomes dimension drives a team approach.

Projects and initiatives are more likely to meet objectives and achieve success when change management and project management are being both used and integrated. An integrated approach increases the effectiveness of project delivery and increases the chances that sustained change happens. Integration of change management and project management enables the practitioners doing the work to be more aligned, the activities more effectively sequenced, and the tools in use more robust. Regardless of your specific approach to integrating people, processes, tools and methodologies, integration of change management and project management provides a more complete approach and solution to creating sustained and meaningful change in your organization.

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