Project Management vs. Change Management: Which Should Lead?

Presented by Jon Weinstein, President of Line of Sight to the PMI Washington DC Chapter

October 23, 2012
The Question…

Which discipline should lead – Change Management or Project Management?
Related but different...

Project Management is...
- Effecting change through a disciplined approach to identify the *scope, tasks, activities, and deliverables* to achieve the new “state”.

Change Management is...
- Achieving change through a disciplined approach to empower people to change behavior and process to success in the new “state”.

©2012 Line of Sight, LLC with permission to the US Department of State PPM COP
ASK THE **Change Manager**…

**Benefits**
- Focus on why, who, where, how
- Head, heart & hands
- Skills and ability
- Think, feel and do

**Challenges**
- None!
ASK THE PROJECT MANAGER...

**BENEFITS**
- Focus on what, when, how much
- Activities
- Functions
- Content

**CHALLENGES**
- None!
AND THE WINNER IS...

THE CONSULTANTS!

Change Management

Project Management

OR

Project Management

Change Management
# Benefits to Integrating

<table>
<thead>
<tr>
<th>Practical</th>
<th>Potential</th>
</tr>
</thead>
<tbody>
<tr>
<td>Change Leaders and PMs understand the others’ discipline</td>
<td>Highest level of professionalism for both include mastery of key elements of the other</td>
</tr>
<tr>
<td>The disciplines already share critical common elements</td>
<td>Integration of PMO and CMO activities as a business function</td>
</tr>
<tr>
<td>Both disciplines have defined roles within organizations</td>
<td>Strategic/Executive level position to integrate CM/PM role</td>
</tr>
</tbody>
</table>
INTEGRATING THE DISCIPLINES: LIFECYCLE PHASES

**PROJECT MANAGEMENT LIFECYCLE**

- Initiate
- Plan
- Execute
- Monitor & Control
- Close

**CHANGE MANAGEMENT LIFECYCLE**

- Prepare
- Manage
- Reinforce
INTEGRATION: A LOOK AT HOW...

- Governance & Structure
- Activities
  - Sponsor Engagement
  - Coaching
  - Resistance Management
  - Communications
  - Training
INTEGRATION: GOVERNANCE & STRUCTURE

Governance

Executive Steering Committee

Project Sponsor

Project Team

Change Management Team

Structure
INTEGRATION: ACTIVITY LEVEL

- Your thoughts...
- Sponsor Engagement
- Communications
- Coaching & Training
- Resistance Management
### INTEGRATION: ACTIVITY LEVEL

<table>
<thead>
<tr>
<th>Change management Case study activities</th>
<th>Project management Case study activities</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Similar activities</strong></td>
<td></td>
</tr>
<tr>
<td>Communicating and managing stakeholders and their expectations</td>
<td>Communicating—organizes presentations, represents the project at team meetings and reports to sponsors</td>
</tr>
<tr>
<td>Change management planning</td>
<td>Planning</td>
</tr>
<tr>
<td><strong>Different activities</strong></td>
<td></td>
</tr>
<tr>
<td>Changing behaviors and organizational culture to achieve the goals</td>
<td>Coordination and management of meetings</td>
</tr>
<tr>
<td>Preparation of users</td>
<td>Strategic decisions</td>
</tr>
<tr>
<td>Organizational structure</td>
<td>Team development</td>
</tr>
<tr>
<td>Political diffusion</td>
<td>Reporting to board and business</td>
</tr>
<tr>
<td>Impact analysis</td>
<td></td>
</tr>
<tr>
<td>Selling the change</td>
<td></td>
</tr>
<tr>
<td>Champion schemes</td>
<td></td>
</tr>
<tr>
<td>Involvement in process analysis work</td>
<td></td>
</tr>
<tr>
<td>Training and education to affected staff</td>
<td></td>
</tr>
</tbody>
</table>

INTEGRATION/ACTIVITY: SPONSOR ENGAGEMENT

Change Management
- Prepares sponsors for their role in the change process
- Provides content for their activities and interactions
- Checks “bad” behavior

Project Management
- Codifies sponsors’ roles and responsibilities
- Establishes framework for their engagement
- Informs on progress and engages in decision-making
INTEGRATION/ACTIVITY: COMMUNICATION

Change Management
- Emphasizes the “why” and the “personal”
- Addresses and elicits/encourages behavior
- Provides conduit for participations in change

Project Management
- Emphasizes the “facts” – who, what, when, and how
- Addresses action, deliverables, and outcomes
- Provides conduit for information sharing
**INTEGRATION/ACTIVITY: COMMUNICATION**

- Two methods for planning; an opportunity for Integrated Communication Planning approach

<table>
<thead>
<tr>
<th>Milestone</th>
<th>Project Message</th>
<th>Change Message</th>
<th>Audience</th>
<th>Objectives</th>
</tr>
</thead>
<tbody>
<tr>
<td>Integrated Service Complete</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
INTEGRATION/ACTIVITY: COACHING & TRAINING

Change Management
- Builds change management competency across key stakeholder groups
- Identifies and trains “change agents”
- Coaches and guides sponsors and affected people through the change

Project Management
- Directs Task Managers and team members in executing project management processes
- Identifies gaps to train on what has changed in the process
- Provides structure (e.g., events and methods) for developing new “technical” skills to adopt change
INTEGRATION/ACTIVITY: RESISTANCE MANAGEMENT

- Three ways to deal with resistance management:

1. Prevent it…
   - Build Change Management competency in the organization’s leaders

2. Proactively manage it…
   - Predict and plan for it using Risk Management tools and techniques

3. React to it…
   - Build coping processes and competencies of Sponsors, Project Managers, and key team members
Aligning the Disciplines: Competency

- Leaders
- Skills & Knowledge
  - Project Managers
  - Change Managers
# Aligning the Disciplines: Competencies

<table>
<thead>
<tr>
<th>What project managers do</th>
<th>What change managers do</th>
<th>What program managers do</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Similar Competencies</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Leadership</td>
<td>Leadership</td>
<td>Project/program organization and management (leadership)</td>
</tr>
<tr>
<td>Stakeholder management</td>
<td>Stakeholder management</td>
<td>Understanding clients objectives/managing client interface</td>
</tr>
<tr>
<td>Planning</td>
<td>Planning</td>
<td>Approach and strategy for the project/program (planning)</td>
</tr>
<tr>
<td>Team selection/team development</td>
<td>Team development</td>
<td>People and resource management/team selection</td>
</tr>
<tr>
<td>Communication</td>
<td>Communication</td>
<td></td>
</tr>
<tr>
<td>Decision-making and problem-solving/Strategic decisions</td>
<td>Decision making and problem solving</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Cultural skills</td>
<td>Cultural awareness</td>
</tr>
<tr>
<td><strong>Different competencies</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Administration</td>
<td>Analysis and assessment</td>
<td>Risk management</td>
</tr>
<tr>
<td>Monitoring and controlling</td>
<td>Training and education</td>
<td>Scope management</td>
</tr>
<tr>
<td>Closing</td>
<td>Creative and challenging</td>
<td>Commercial awareness</td>
</tr>
<tr>
<td>Technical performance</td>
<td>Initiative</td>
<td></td>
</tr>
<tr>
<td>Organization structure</td>
<td>Facilitation and presentation</td>
<td></td>
</tr>
<tr>
<td>Project definition</td>
<td>Action orientation</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Process design</td>
<td></td>
</tr>
</tbody>
</table>

ALIGNING THE DISCIPLINES: ROLES & RESPONSIBILITIES

Employee-Facing

Enablers

- Structured approach to enable others

Executive

Fulfilling the role of sponsors of change

Manager

Coaching their direct reports

Change Manager

- Providing expertise

Project Manager

- Integrating the “technical” and “people side”

Project Support
Selecting The Right Structure

Supportive culture and/or Leadership

Degree of Behavioural Change Required

1. PM with some CM skills
   Or PM plus CM

2. PM with strong CM skills
   Or PM plus CM

3. PM with strong CM skills
   Or PM plus CM

4. CM with PM
RESISTANCE IS FUTILE; YOU MUST ASSIMILATE

- Shift in paradigm from the disciplines as separate and distinct, to the integration of the core concepts, objectives, tools and techniques

- Change Management provides the people substance, project management the technical substance

PROJECT MANAGEMENT LIFECYCLE

Initiate > Plan > Execute > Monitor & Control > Close

Prepare > Manage > Reinforce

CHANGE MANAGEMENT LIFECYCLE
What Can You Do?

- Pick one and focus; start with CM or PM to drive the integration
- Promote and improve both disciplines in parallel, while integrating them
- Seek opportunities to alternate
- Perform one while educating yourself on the other
Pursue Excellence Because...

“Mediocrity is expensive!”

Congressman Elijah Cummings
Maryland 7th District
Senior member of the Committee on Oversight and Government Reform
At Your Favorite Online Bookstore Today

Available to order on Amazon.com or download on:
Books.Google.com/ebooks

Look out for our next book…
“Government Manager's Guide to Project Management”
(Management Concepts: 2013)
Contact Information

Jonathan Weinstein, President

jweinstein@line-of-sight.com

Local: 410.696.2610

www.line-of-sight.com

Offices in the Baltimore-Washington & New York Capital Regions

©2012 Line of Sight, LLC with permission to the US Department of State PPMCOP