Course PM721: Managing Change Initiatives as Projects

Duration and Positioning

One way that organizations adapt to changing business and marketplace realities is by executing change initiatives that align people, products and services to strategy. These change initiatives may require significant organizational realignment, tactical process improvement, functional role adjustments or be part of ongoing efforts in continuous improvement. In all these cases, change initiatives benefit from the application of formal project management mindsets, tools and techniques.

This course is available in two potential configurations:

- 1 day instructor led training. While the course does come with an onboard scenario-based case study, participants are encouraged to use the workshop and exercise periods to apply the learning to an actual project they are involved with.

- 1.5 day instructor led training that includes an additional learning activation workshop. The workshop brings your instructor back in as a consultative coach while teams of participants further apply the learning to one or more actual projects. Our clients have found this approach extremely valuable, as they work through the mechanics of building a project structure and strategy.

Who This Course is For and Prerequisites

Managing Organizational and Process Change Projects blends the disciplines of Change Leadership / Management and Project Management. It is designed for business professionals at any level who are charged with managing change initiatives as projects. It also provides key learning for project team members and stakeholder groups who are involved in and support the work of change projects.

As a foundation level course, no previous formal training in project management is required.

What You Will Learn

Upon successful completion of this course, you will be able to:

- Identify and map what is driving change within your organization to the business outcomes and deliverables that represent key performance indicators and critical success factors for your change project

- Create a project framework for change initiatives that scopes, enables, monitors and controls the implementation of change

- Apply best-practice project management tools and techniques to maximize value and the return on investment for change initiatives

- Create and execute an effective communication strategy that aligns business stakeholders and users with change strategy.

Course Outline

- Getting Started: Thinking in Projects

    - Framing change initiatives within the context and framework of strategic programs and tactical projects

    - Aligning change initiatives with strategy execution

    - Mapping business requirements and desired outcomes to specific, visible and measurable deliverables

    - Understanding and engaging business stakeholders and the project team

    - Scoping the work

- Understanding and Mastering Change

    - The Adaptive Cycle: how and why organizations evolve

    - Making Change Work: drivers of change; factors that affect success or failure

    - The three key facets of change leadership and management: business leader, team leader, self-leader

    - Managing the Process as People Work Through Change: The Impact of Change Model™ and the Four Phases of Response to Change

- Initiating and Planning Your Change Project

    - Selecting the right project management approach for the situation: waterfall, iterative and agile – what works best when

    - Scoping the project: mapping requirements to deliverables; product versus project scope; managing change within change – managing scope creep

    - Managing the documentation monster: identifying and balancing the necessary minimum amount of documentation needed to enable planning, managing expectations and project control

    - Building the Project Plan: resources, risk, work breakdown analysis; estimating, scheduling, financials, project monitoring and control; change; communication

    - Building the Extended Project Team: stakeholder analysis inside and outside the target business area; using skills inventories to assist in building the core project team; establishing role clarity; modeling relationships based on deliverable accountability; RACI analysis.

- Executing, Monitoring and Controlling Your Change Project

    - Aligning Communications: KUBA™ and communications planning; the W5 communications framework; the elevator speech and communication consistency; creating your communications strategy with core and subgroup messaging.

    - Tracking and reporting on status: work completed versus work remaining; costed milestone reporting; deliverable based tracking; burndown charts and adjusting productivity to deadlines

    - Closing the project: knowing when you are done. Linking the project to next-step work.