

# Project Management: Leading Change

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An important aspect of leading people is the ability to gain support and cooperation when implementing a change in the way people work. The benefits of being an effective “change agent” are increased support for the change, minimizing resistance, and expediting the change process.

There are four general steps to leading a change effort:

1. Identify the key players
2. Develop an implementation plan
3. Understand people’s behavioral patterns and reactions to the change
4. Lead the change process

## Identify Key Players

It is important to identify the critical stakeholders in any change process. As the project manager you are often responsible for being the change agent, but the key roles are:

- **Advocates** – want the change but don’t have enough organizational power to sponsor it by themselves. Advocates are involved with the change, emotionally committed, and understand the importance of the change. Advocates need to identify a sponsor or a network of sponsors across organizations. They also need to maintain their commitment throughout the change process.
- **Sponsors** – have positional authority to commit resources. Sponsors need to understand the scope of the change and commit all necessary resources. Sponsors should monitor procedures and be committed to sacrifices that ensure success. Sponsors should demonstrate a sustained commitment to the change and be a role model.
- **Agents** – carry out the change. Change agents need to assess and develop the following characteristics:
  - Competence
  - Credibility
  - Trustworthiness
  - Willingness
  - Availability
  - Tolerance of ambiguity
  - Self-confidence
  - Proactive
  - Creativity
  - Achievement orientation

Change agents should focus on solving problems not creating or contributing to conflict. They need to use influence instead of power. They need to plan, understand the culture of the organization, and create synergy. Change agents need to identify who will be impacted by the change (i.e., stakeholders).

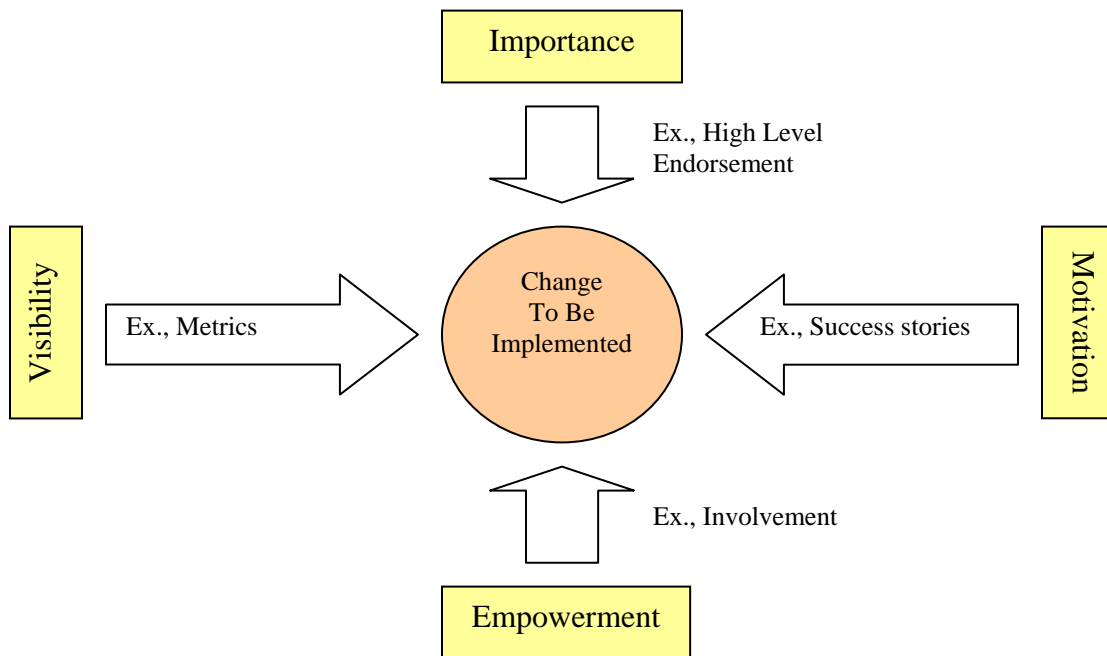
- **Targets (Stakeholders)** – receive or adjust to the change.

## Develop Implementation Plan

Just like with any project definition, it's important to start with an understanding of the reasons for the change. For example, productivity metrics have been showing an undesirable trend, morale is bad, or there have been significant modifications of the work environment. **Understanding the reasons** for the change prepares you to lead the change. You must understand the value of the change and the return on investment that justifies the risk and resources required to make the change.

To reduce resistance to the change get stakeholders involved from the outset. Use them to investigate alternative implementation strategies. **Develop a plan** for implementing the change. Also, anticipate the impact and consequences of the plan and develop contingencies.

Understand and use all the elements referred to in Figure 1 below to **enable the change** and encourage creative thinking:



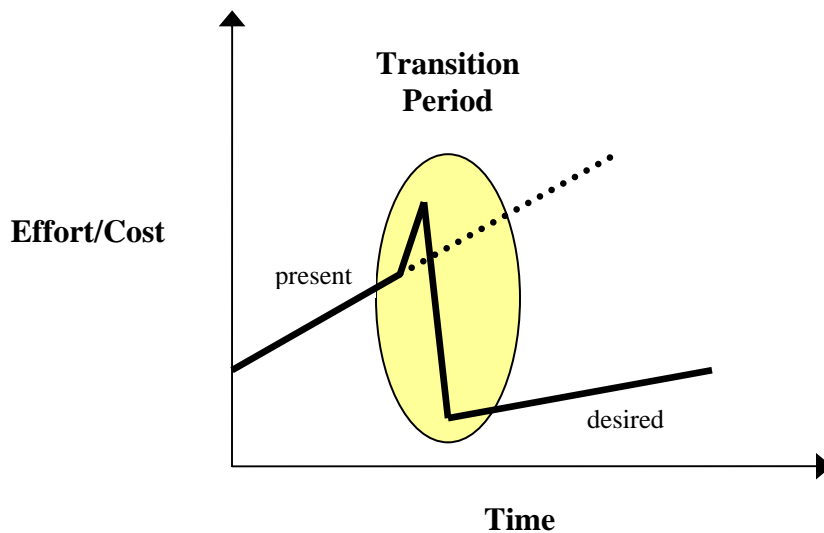
**Figure 1** – Factors that enable change

In order to **persuade others** to support the change, share facts and the rationale that help others believe in the plan. For example, “this plan will ensure that the organization remains competitive,” or “this plan allows us to take advantage of a critical strategic opportunity,” or “leverage a market window,” or “delaying this plan will lead to a greater expense later.”

When the implementation plan is finished **get approval** from the sponsor, and consensus from the advocate(s) and change agent, and any other necessary approvals from other stakeholders within the organization.

**Develop a communication plan** to all stakeholders that consistently informs them of what is changing, what is not, and why. Identify who will communicate the plan and when. Separate rumors and proposals from facts and approved plans. Clearly describe the current situation or process. Communicate reasons for the change, root causes, desired results, benefits to the target group and the organization, and the context for the change to all levels of the organization. Highlight how support of the target group is important. Be available after the plan is communicated to answer questions and respond to concerns.

To **help stakeholders prepare for the transition period** during the change implementation, develop a view similar to Figure 2 that depicts the costs of not making the change (ex., continuing the present path leads to greater costs and effort over time).



**Figure 2** – Change transition period

Explain that long term benefits justify the short term effort. “A woodsman knows that a little effort in sharpening the axe first saves a lot of effort in cutting down the tree later.” Set stakeholder expectations for how long and what you expect to happen during the transition period. Provide complete plans and clear communication to avoid surprises.

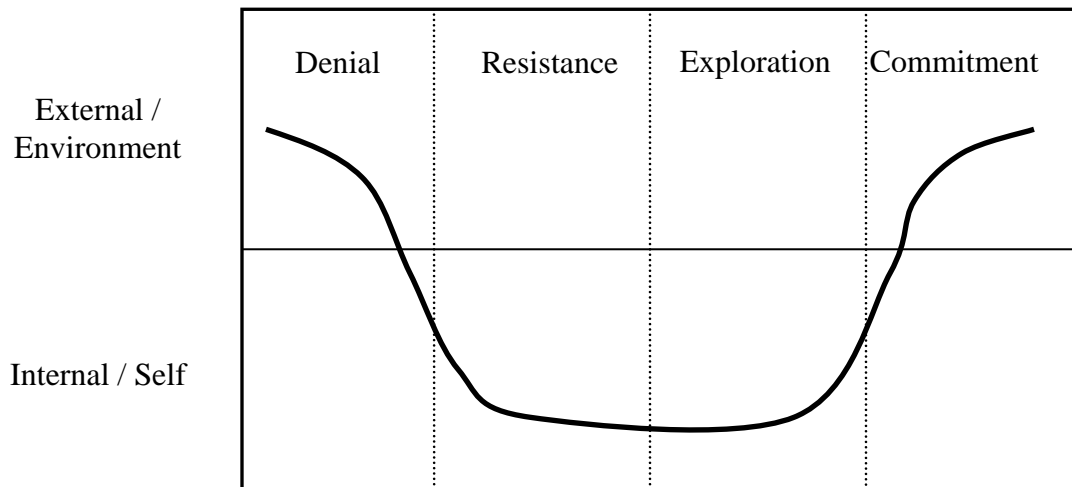
### **Understand Behavioral Patterns and Reactions**

There are some **common inhibitors to change** that the project manager should anticipate and be prepared to manage:

- Resistance to *imposed* change
- NIH – the idea won’t work because it was *Not Invented Here* – “our situation is different”
- Lack of involvement leads to no buy-in

- “We already tried that”
- “It doesn’t feel normal”

A project manager also needs to understand the emotional responses and stages (see Figure 3) that people go through while coping with change.



**Figure 3** – Stages of coping with change

When someone experiences a change (i.e., an ending of something familiar) they initially *deny* anything has changed. This is followed by several types of *resistance* (ex., anger, bargaining, and depression). When the person finally accepts that “what was” has changed they begin *exploring* alternatives for starting over or continuing on. The last stage is *commitment* to the “new beginning.”

Everyone needs to go through each stage in sequence and some people go through them faster, and some slower. During the exploration phase there may be several false starts before the person finally determines the best “new beginning” to commit to.

### **Lead the Change Process**

The project manager must ***lead the change process*** as opposed to being a victim of it. Be sure to educate others about the change and motivate them to support it. Teach them the desired behavior by modeling it. Lead by example. Remember that the change is new for them and will take some time to get it right. Give them time to get used to the change. Reinforce the need for flexibility. You can build commitment incrementally by breaking down big problems into small, doable steps (small wins).

***Test for problems and support*** by inviting people to share their reactions to the change. Problems can be addressed sooner and people will feel empowered by their involvement when you bring resistance into the open to address causes, identify potential problems

and answer questions. Encourage people to ask “*what*” or “*how*” questions about the change instead of “*why*.” Develop productive responses to their reactions. Ask them to identify perceived benefits from the change. Ask for ideas on how to make the change successful. It may be useful to try pilot tests of the change to identify unanticipated results. Remember that changes are a natural part of business dynamics.

***Recognize people for their support and efforts*** in making the change successful. Acknowledge positive changes in behavior. Document individual’s responses to the change in their performance appraisals (“What gets measured gets done”). Thank people for their support and cooperation during the change process. Celebrate milestones toward achieving the change. Appeal to self esteem. Reinforce teamwork values.

Be sure to ***follow through*** and ensure that the change has successfully led to the desired outcome. Use ***metrics***. Correct the process if necessary and continue to lead additional change if the desired outcome was not achieved. Put processes in place to sustain the change over time.