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ABSTRACT

The purpose of this conceptual paper was to provide key details for how practitioners can build a bridge between the Change Management (CM) and the Project Management (PM) tasks and roles in organizations. This paper is a conceptual paper discussing the integration of CM and PM in organizations and provides one approach to utilize this integration in a practical work environment. This approach was both specific and replicable in most business environments where projects are the key vehicle in delivering changes across the organization. This paper illustrated one way to integrate change through a framework of utilizing existing project team members in the role of project “change lead”; operational leaders in a change-champion capacity; and change-management experts in a centralized role to consult, control, and ensure consistency throughout the change journey. This concept is one strategic approach to CM and PM integration were created to utilize people as a resource in change projects. The approach adds value (1) to PMs needing assistance in CM integration and (2) to CMs integrating change projects within their organizations.

Keywords *Change Champion, Change Management, Project Change Lead, Project Management*

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INTRODUCTION

Modern organizations operate in a world full of external influences and internal pressures that prompt them to be more nimble, adaptable, and flexible than ever before. This volatile, uncertain, complex, and ambiguous (VUCA) (Lawrence & Steck, 1991) world has changed the way many organizations view change management (CM) and project management (PM). “The desire and necessity to keep pace with the changing business environment has caused many companies to shift from being operationally focused to being project driven” (Jarocki, 2011). Organizational structure has changed to support more project-based or project-focused strategies.

The field of project management has grown significantly and will continue to grow in the future based on this trend. A 2017 report published by the Project Management Institute (PMI) predicts that Project Management jobs will grow by 33% worldwide between 2017 and 2027. In real numbers, 6.7 million PM jobs in the United States will grow to 8.8 million by 2027, reflecting a 31.34% increase over the next ten years (Project Management Institute, 2017).

Despite shifts to a project-oriented environment that supports a nimble, adaptable, and flexible style, organizations still struggle to keep up. “70% of all change initiatives fail” (Beer & Nohria, 2001). In response, some organizations create smaller, easier-to-manage projects and hire skilled project managers to maintain pace with never-ending change. Unfortunately, “the technical background of traditional project managers has resulted in a focus on tasks and results rather than the human aspects and softer skills of Change Management, which are equally valuable to project success” (Parker, et al., 2013). This approach has ignored the human side of the change process and, instead, has rapidly deployed project resources to deliver on

tight timelines to remain relevant in today’s VUCA world.

The theoretical framework outlined below is intended to address and resolve the conflict between CM and PM by providing one cogent strategy that aligns the primary goals of project management and change management. This strategy specifically embeds change-management infrastructure directly into the project team and approach.

REVIEW OF LITERATURE

Project Management Overview

Project Management requires only a simple overview for many reasons. First, the Project Management Institute (PMI) is considered as the premier expert in this field and establishes the Project Management Body of Knowledge, or PMBOK. The PMBOK provides a consistent framework, terminology, and methodology for managing projects. Project managers who are successfully assessed against this framework earn the well-respected Project Management Professional (PMP) certification. The PMI consistently updates its PMBOK framework, which “recognizes five basic process groups (initiating, planning, executing, monitoring and controlling, and closing) and ten knowledge areas typical of almost all projects” (Project Management Institute, 2017).

- Project Integration Management
- Project Scope Management
- Project Time Management
- Project Cost Management
- Project Quality Management
- Project Human Resource Management
- Project Communications Management
- Project Risk Management
- Project Procurement Management

- Project Stakeholder Management (Project Management Institute, 2017).

This framework allows PMs to manage and control segments of the project through processes, inputs, and outputs that track the progress of the project. Although there is a process in Project Integration Management that discusses integrated change control, this does not directly ensure the tracking of all CM activities. However, it could provide a process framework for tracking these changes and ensuring that PMs and CMs stay aligned.

Successful project management incorporates the social and people aspects of change. Knowledge areas of the PMBOK framework, such as Project Human Resource Management, Project Communications Management, and Project Stakeholder Management, are littered with the essence of effective CM practices. These are vital considerations to manage inevitable change that most projects elicit (Project Management Institute, 2017). For the change to truly become the new normal, an integrated approach to PM and CM is necessary.

Change Management

Change Management is more difficult to summarize in simple, consistent terms and language because there are different models, frameworks, methodologies, and accepted practices in the CM field. For purposes of this study, the organization explored and established its own synthesized framework for change based on several change-management models, notably John Kotter's Eight-Step Process for Leading Change (Kotter, 1996); Lewin's three-step change theory (Lewin, 1947); and Luecke's seven-step process for managing changes and transitions (Luecke, 2003).

Although fully supported by other change management models, this synthesized framework for change utilizes a seven-phase approach. These phases are assembled into a sequenced order, yet

can be combined and intertwined. Practitioners can select the applicable phase, whether in sequence or not, and employ related tools and methods given the greatest change-management needs that are presenting. Change management often requires a flexible and agile approach; this toolkit supports both.

The first phase in this framework for change is *ignite interest*. In this phase, change agents begin creating energy and urgency around the change. Oftentimes, urgency is established when a change propels the organization toward a better future state or distances it from a current, undesirable state. Messaging in this phase appeals both to the emotional and rational brain, acknowledging that change happens one individual at a time, and most human actions are led by emotions, rather than reason. "Emotions, it turns out, inform both sides' judgements and behavior even more powerfully than rational or dispassionate thinking" (Fleming & Asplund, 2007, p. 25).

The second phase is *know your audience*. In this phase, the stakeholders that will be affected by the change are analyzed and preliminarily engaged to gather baseline feedback to support the change initiative. From the outset, this turns a prescriptive, organizational-driven change into a more collaborative and human-centered-driven change. This phase is particularly important to fully understand the needs and expectations of the executive stakeholder, who typically has the formal power to propel or quash the change efforts. In this phase, change agents begin to consider compelling ways to respond to the burning question on every stakeholder's mind: What's in it for me? Finally, early champions of the change are identified and given meaningful roles to support the change.

The third phase is *see your destiny*. In this phase, a common vision for the change initiative is established to guide efforts. This vision should align

with both previous phases by igniting interest and energy around the change and by respecting stakeholders' needs and expectations.

John Kotter (2006) has indicated that organizations often skip these preliminary, yet critical, phases and begin the change process at problem resolution (Kotter, 2006). In this organization's synthesized change framework, the fourth phase, which begins to strategically address the problems or issues, is *design your path*. In this phase, the vision becomes a reality through crafting an operational plan to execute the change through key objectives, goals, strategies, and measures of success. Additionally, it is important to determine key roles that will execute the change and to leverage the central change team to support the objectives. Now, energy around the change initiative was created; key stakeholders were identified, analyzed, and preliminarily engaged; a common vision was created; and a tactical plan to achieve that vision was established.

As change agents begin to execute that vision, they enter the fifth phase where they *publicize* the change. This means exactly as one would expect: it is time to communicate the change broadly and purposefully. A well-crafted communication plan continues the change momentum with messages that appeal to both the rational and emotional brain that are tailored to the differing needs of various target audiences. For example, rational messages often are informative, logical, and educational; emotional messages stir emotions and motivate others often through storytelling, symbolism, and analogy. Communications are more intensely targeted to those stakeholders who have greatest interest in the change and most influence over its ultimate success (or failure). It's important to note that communications are an important ingredient throughout the *entire* change process, but certainly essential when the change plan is executed.

The sixth phase is *inspect, reflect, and celebrate*. This phase allows the change team to measure the effectiveness of the change, adjust actions in real time, and reflect on lessons learned through the change. Progress – whether in the form of big or small wins – should be highlighted and celebrated. Positive recognition of the change maintains the energy toward the seventh phase, *formalize and normalize*. In this final step, the formal change effort comes to completion. The original change simply becomes the new normal. Policies, processes, and procedures support this new normal. Those affected by the change have built a natural tendency toward the change.

This strategic framework for change is iterative. Change is constant, inevitable, and a never-ending cycle. One organizational change can have far-reaching implications on people, processes, and technologies. Once the new normal has settled, a focus on improvement may prompt the need for a new change initiative, and the change phases are activated once again.

This synthesized framework for change has several touchpoints with project management. For example, phase two, *know your stakeholders*, also is a step in the PMBOK. Phase four, *design your path*, has PM undertones. These examples illustrate that the change plan can borrow from PM techniques to become practical and operational. The change plan must be closely aligned with the project plan since both represent parallel efforts containing sequenced inputs, tasks, and outputs to accomplish goals and objectives toward successful organizational outcomes. Thus, an integrated approach is strongly recommended.

Change Infrastructure

The change infrastructure outlined in this framework was implemented to support transformational change to the way that both the organization and its employees conduct business.

This framework applied to multiple work streams with respective, key objectives to produce overall project outcomes. This change infrastructure is flexible enough to be applied to smaller projects. This is critical since some theoretical change frameworks are valid applications in small, individual settings, but are not readily scalable. As presented in this paper, this framework was tested in a large, complex enterprise.

Role Definition

Within this change framework, it is important to outline and transparently communicate each role’s duties and responsibilities. This ensures that all components of PM and CM strategies are executed thoroughly and in a synchronized way.

Functional Project Manager

The Functional Project Manager is the most important role for managing tasks, milestones, resources, budget, meetings, and project-team accountability. The functional project manager does this by ensuring that the project team always maintains appropriate resources while staying in scope and achieving milestones within established timeframes.

Project Change Lead

The Project Change Lead is the core change agent embedded in the project team who, among other things, reflects the voice of change in all project meetings. The change lead should be empowered to challenge the project team and ask provocative questions related to how the recommended changes will impact stakeholders. Key responsibilities for this role include:

- Act as the voice of change for the functional project team
- Serve as the change liaison and champion from the functional project team to other teams
- Track and monitor change impacts
- Participate periodically in the Integrated Change Management Team meeting (see below); seek consultation, resources, and support on change, communications, and training issues
- Ensure the PM is weaving change, communications, and training items into the project plan
- Follow the Project Management / Change Management Alignment chart (see Appendix A) and complete appropriate tasks timely
- Prepare PM with speaking points to report change/communications initiatives to broader audiences

CM to PM Alignment Chart

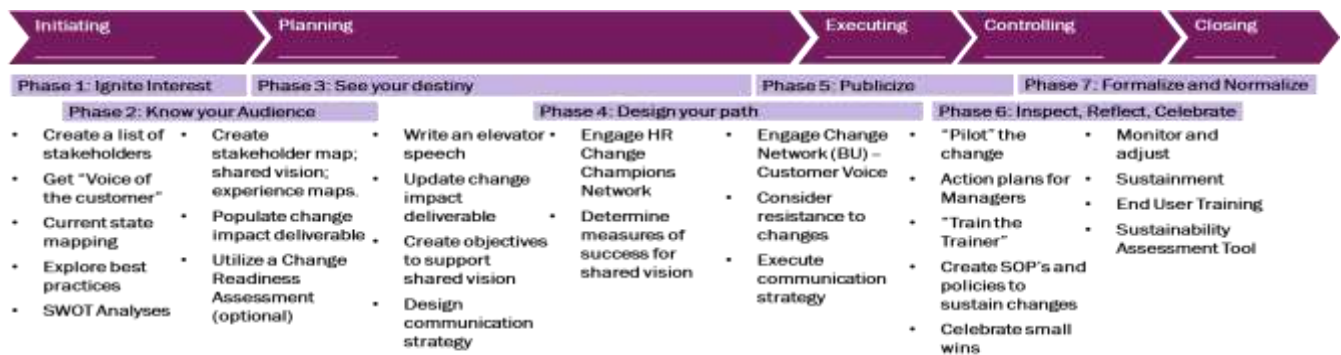


Figure 1: CM to PM Alignment Chart

In many instances, these project change leads may not be formally trained in change-management theories or practices. Therefore, it is imperative that the Integrated Change Management Team leverage their expertise in preparing the change leads for their important role by, among other things:

- Introducing them to the change model and explaining how it unfolds throughout the project lifecycle
- Providing resources, tools, and templates that support the change cycle, such as stakeholder analysis, change impact analysis, training plan, and communication plan
- Inviting them to periodically attend the Integrated Change Management Team meetings to provide updates, seek clarity, ask questions, gain expert insight, and obtain needed tools, resources, and support

Integrated Change Management Team

This integrated and central change management team is designed to create a solid core infrastructure that consists of change management, communication, and training experts. The team's primary role is to serve as a consultant and advisor for each project team by unifying the efforts of the project change leads and the HR change champions. Whether internal or external, the change management experts should have a strong command of change-management and organizational-development theories and practices so that they can define an effective, overall strategy and infrastructure for the project. Additionally, these individuals should understand the organizational culture and sub-cultures.

The communication experts should be individuals who understand how to leverage both written and verbal communications, as well as symbols and other imagery, within the organization to inform,

excite, and influence the target audience, including stakeholders, through effective communication channels, tools and techniques. Managing communications is a two-way process: (1) outward communication to stakeholders to ignite energy and publicize key changes/impacts (through the change champions) and (2) inward communication from stakeholders to ensure a human-centered approach in each project team's design and implementation decisions. Early in the project, communication experts may focus on inward communication by gathering the voice of the customer and providing to the project teams. This process itself ignites interest and energy as stakeholders feel that they are influencing the change. Later in the project, communications may focus more outwardly to publicize key changes/impacts.

Training experts round out the integrated team by leveraging adult-learning principles and ensuring that stakeholders gain valuable knowledge, skills, and abilities to successfully function in the future state. These experts should be able to translate change impacts and separate those that require awareness (communication) versus knowledge or skill acquisition (training). By understanding stakeholders' learning needs and preferred methods for acquiring new knowledge and skills, training experts can design and implement timely and effective interventions, including workshops, tutorials, and online modules. Furthermore, to sustain stakeholder growth and development through the change transition and into the new normal, these experts design performance-support resources, such as job aids and just-in-time micro-learning.

Change Champion (Human Resources) Network

The change champion (HR) network is important because most organizational changes require employees to change the way they work. Championing change is simply an extension of the

role that HR already serves with its stakeholders. HR is intimately involved in a variety of people issues throughout the organization. Positioning HR as change champions further extends their involvement in these issues.

Specifically, HR Change Champions support change across the organization by:

- Raising awareness of the change, including benefits, to their stakeholders
- Addressing concerns and anxieties
- Correcting behaviors that undermine the change
- Identifying roadblocks and challenges
- Recognizing behaviors that promote the change
- Raising the voice of their stakeholders to project managers and change leads
- Generating ideas and solutions for HR and business-unit (BU) audiences
- Facilitating and supporting the change process in conjunction with the Integrated Change Management Team

Change Champion (BU) Network

The BU change champion network is designed to be an extension of the HR change champion network and to truly prepare the organization for change by providing feedback on the areas of the organization that may require unique or different interventions. BU change champions often are formal or informal organizational leaders at the local level that have power and influence to propel the change process; remove roadblocks and barriers to change; and ensure that the change truly can succeed as the new normal. These change champions can be pivotal in adopting the change, yet adapting or customizing implementation to best meet stakeholders' needs, reduce resistance, and build positive momentum around the change. The HR change champions can be the conduit for

identifying well-connected BU change champions who have organizational knowledge and influence.

Strategic Theoretical Framework

As stated previously, this framework (Figure 2) is designed to leverage individuals as resources in the project and assign specific roles for how to manage CM and PM activities. "The purpose of 'integrated change management' is to achieve the desired target state by integration of the organizational and individual change processes on the one hand and by the integration of project and change management on the other hand" (Wanner, 2013). This framework consists of five major roles: Functional PM, Project Change Lead, Integrated Change Management Team, Change Champion (Human Resources), and Change Champion (Business Unit). (Business Unit refers to a specific subdivision within the organization, such as based on physical location, job family, job function, or any other identifiable factor that groups operations). Each of these individuals plays a vital role in connecting CM and PM activities and ensuring the greater probability of success for the change, project, or change project.

The most vital strategic part of this infrastructure is the central Integrated Change Management Team. This team is comprised of internal and/or external individuals with CM expertise and is the lynchpin between the project teams and the stakeholders that they serve. CM expertise is necessary since these specific team members advise and consult the other roles on CM models and strategy, communications, stakeholder engagement, and training. These social and people aspects are vital to ensuring that the CM activities are completed under one common, consistent framework. Additionally, this team monitors the change process and maintains connectivity and accountability between the left side (project-oriented) and the right side (stakeholder-oriented) of the model.

Strategic theoretical framework



Figure 2: Strategic theoretical framework

The left side will be viewing the change/project through the many tasks and plans that will impact the organization. The right side will be viewing the change/project through the lens of how the organization and various stakeholders will be impacted by and will receive the changes from the project team.

As an example, if the project is designed to implement a new technology across the organization, there are numerous tasks and milestones that the PM will track and monitor. The PM aligns and works with the project change lead (i.e., a change agent embedded in the project team) to plan, prognosticate, and measure the organizational and stakeholder impacts. On the other hand, the Change Champion (BU) Network is comprised of operational individuals who champion the change to stakeholders and both collect and share stakeholder feedback on how these changes are affecting them and their work. The Change Champions (BU) relay this critical information through their Change Champions (HR), who then will bring this to the Integrated Change Management Team. This integrated team serves as the central hub for those changes issued from the project teams and for feedback from the operational business. This empowers the integrated team to shift CM strategy, tailor communications, build training, and capture the voice of the customer as needed to ensure that changes will be successful.

This nimble and flexible approach to change management coincides with the VUCA environment in which many organizations compete. As mentioned previously, the measure of successful change is not just about implementation; it is also about effectively transitioning from the change state to a new normal. One way to arrive at the new normal is to support those affected in understanding the rationale of the change. Another way is to plan a positive transition experience from current to future state that mitigates stakeholder resistance and accelerates acceptance.

HR's Involvement in CM

In addition to the VUCA environment in which organizations operate today, one particular function is experiencing its own tumult: HR. "More than 80% of organizations say they've just completed or will soon start to transform their HR organization" (Effron, 2017, p. 1). A strategic framework, such as the one proposed, will provide infrastructure and strategy behind significant change, including ones as large and as complex as an HR transformation. This framework will foster collaboration and alignment across HR and between HR and its stakeholders. Additionally, as Change Champions, HR can be true advocates and ambassadors of their own transformation.

In addition, studies have shown that HR is in fact a key player in change management efforts. In a study posted by Human Capital Institute in its *Change Management for HR* (microlearning), more

than 74% of organizations stated that they have involved HR in change efforts (Human Capital Institute, 2017, p. 7). Even more impressive, this same study indicated a direct relationship between change success and HR involvement. According to the study, project changes with 51% or greater success rates involve HR 63% of the time (Human Capital Institute, 2017, p. 8). In comparison, when project change success drops below 51%, HR involvement is virtually non-existent. This study shows that the less HR is involved, the less successful the change is likely to be. Studies of this nature expose the value of HR as a major function in change projects. The proposed strategic framework for CM and PM alignment engages HR for overall change-management success.

Future Research Implications

There are many opportunities for future research in this area. First, this is only one approach for utilizing people in specific roles to manage change in projects. There may be additional ways to utilize different roles in the change process. Additionally, there may be ways to utilize a technology or process to assist PMs with ensuring that CM tasks

are completed in an efficient and effective manner. Finally, it would be encouraging for future research to focus on a pragmatic and fully consolidated view of PM and CM. Rarely is there a project that does not have some change implication for an organization.

CONCLUSION

Few articles stress the importance of the integration of CM and PM activities. Previous approaches to this integration focused on comparing the various phases or steps in the change process to the steps in the PMBOK or other project-management methodologies. Practitioners may discount these approaches as purely theoretical, arbitrary, and lacking specific detail and direction for aligning CM and PM. The proposed infrastructure outlined in this article offers one way to utilize people as resources in both PM and CM activities by clearly delineating a variety of roles and their related tasks and responsibilities. A centralized, integrated change team orchestrates these roles and puts rigor around integrating the human aspects of CM with the technical tasks, timelines, and milestones of all change projects.

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