



# EFFECTIVE PPM CHANGE MANAGEMENT

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# AGENDA

- + About Upland
- + Webinar
- + Questions

# WHAT WE DO

We provide Cloud Solutions across the enterprise enabling amazing customer outcomes in:

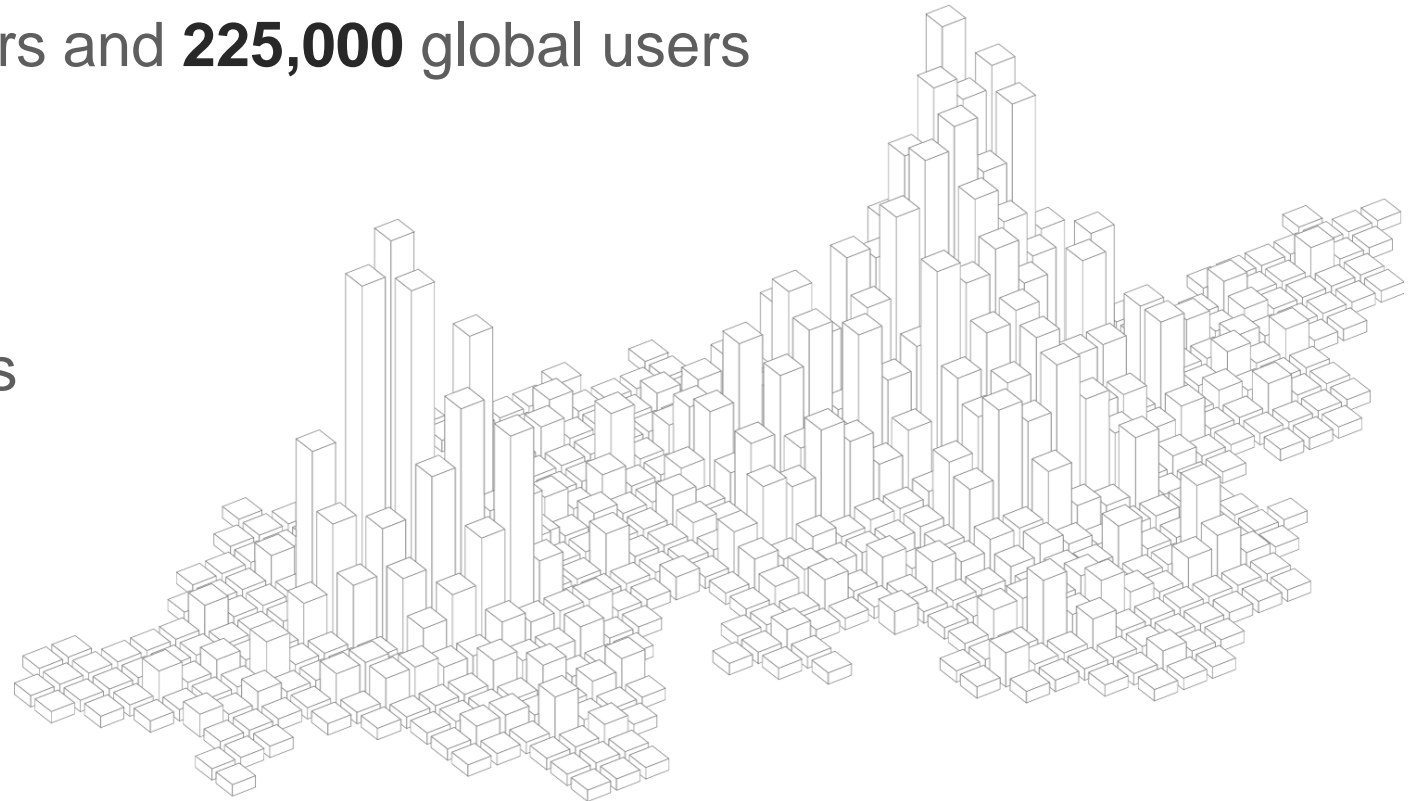
+ PROJECT & IT FINANCIAL  
MANAGEMENT

+ WORKFLOW  
AUTOMATION

+ DIGITAL  
ENGAGEMENT

# OVERVIEW

- + **Leading provider** of cloud-based Enterprise Work Management software
- + Supporting over **1,600** customers and **225,000** global users
- + **IPO** in 2014
- + Headquartered in **Austin, Texas**



# UPLAND PRODUCT FAMILY

## PROJECT & IT FINANCIAL MANAGEMENT

*Manage your organization's projects, professional workforce and IT costs.*



## WORKFLOW AUTOMATION

*Real time productivity optimization, collaboration, and functional automation across your organization's value chain.*



## DIGITAL ENGAGEMENT

*Effectively engage with your customers, prospects and community via the web and mobile technologies.*



# ECLIPSE PPM COMPLIMENTARY ONLINE WEBINARS & DEMOS

- + To Register for our other webinars visit:
  - + [EclipsePPM.com/webinars](https://EclipsePPM.com/webinars)
- + Eclipse PPM Demonstrations
  - + Register at [EclipsePPM.com/ppm-demos](https://EclipsePPM.com/ppm-demos)

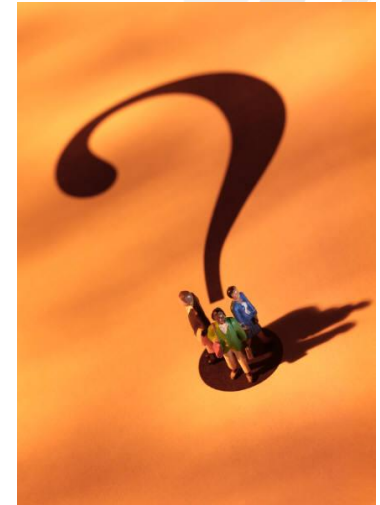
What's in  
it for me?



- + Discover why PPM initiatives fail
- + What's effective PPM change management?
- + Deadly assumptions & guiding principles
- + Executive sponsorship
- + Functional management
- + Project teams
- + Tips & Techniques

# WHY DO PPM INITIATIVES FAIL?

- + Cultural disconnect?
- + Resistance?
- + Too bureaucratic procedures or complex tools?
- + Behaviors do not change?
- + Lack of tangible benefits?
- + Lack of process compliance or enforcement?
- + Inability to bridge strategy, objectives & projects





# WHAT'S EFFECTIVE PPM CHANGE MANAGEMENT?



- + Management of entire lifecycle of PPM improvements to achieve expected business results
- + Increases likelihood that “best practices” are institutionalized

# DEADLY ASSUMPTIONS



- + “If you build it, they will come”
- + “Everyone will follow the new procedures because it’s ‘common sense’”
- + “Management knows these things take time to deliver value”
- + “Developing the new procedures is the hard work”
- + “We can enforce accountability”
- + “Staff resist change on principle”

# GUIDING PRINCIPLES

- + Visible executive sponsorship & commitment
- + Whole lifecycle communication
- + Expect, identify, and manage resistance
- + Address compliance issues constructively
- + “Walk a mile in the shoes”
- + “Show me the money”



# EXECUTIVE SPONSORSHIP

## + Identify business objectives

- + What helps the company and makes a potential executive sponsor look good?
- + Reducing costs of project failure?
- + Reducing impacts of poor resource planning/utilization?
- + Reducing time-to-market?

## + Identify a suitable executive sponsor

- + Pro-PPM/PM?
- + Authority to fund the initiative?
- + Influence to champion change?
- + Will they be around for at least a year?
- + Willing to accept resistance and require compliance?



# EXECUTIVE SPONSORSHIP

- + Once a suitable sponsor is identified:
  - + Derive business metrics from objectives
  - + Gather baseline metrics
  - + Define achievable short-term improvement objectives
- + Refine business case and “recruit” sponsor
- + If you can’t achieve this, don’t bother continuing...



# FUNCTIONAL MANAGEMENT – PERCEIVED NEGATIVE IMPACTS

- + Increased accountability
- + Reduced ability to play politics
- + Reduced authority for project decision- making or project leadership
- + Increased effort spent on resource administration



# FUNCTIONAL MANAGEMENT – POTENTIAL SELLING POINTS



- + Easier to assess resource requests
- + Evidence to justify project prioritization or resource augmentation
- + Reduced effort to understand “what’s going on”
- + Increased visibility into project status & decision making
- + Increased ability to motivate staff
- + Increased gratification for work done

# PROJECT TEAMS - *PERCEIVED* NEGATIVE IMPACTS

- + Counter to North American “maverick” or “creative” culture
- + New procedures = more work
- + Increased visibility into resource allocation = inability to hide
- + “Big Brother” or micro-management
- + No more “custom” project status updates...





# PROJECT TEAMS – POTENTIAL SELLING POINTS

- + More predictability around project outcomes
- + Reduction in effort spent on status reporting
- + Focused & possibly reduced workload
- + Less effort spent firefighting = more time spent completing project work
- + Reduced multi-tasking = less effort wasted on context switching
- + More gratification for work done



- + Include at least 1 resource from each impacted role
- + Review proposed changes with HR or Training
- + Tie individual performance objectives to initiative
- + Coaching is better at addressing compliance issues than enforcement
- + Reward early adopters





+ Avoid “big bang”



- + Focus on least amount of change required to achieve short term business objectives
- + Don't collect data you're not planning to use & share
- + If introducing time entry, publish all reports being produced from the data



- + Actively solicit and incorporate feedback
- + Provide simple “PM 101” training for all impacted staff
- + Make sure you have process coaches!
- + Leverage tools appropriately to automate new procedures
- + Provide explicit procedural guidance



# SITUATIONAL CHANGE MANAGEMENT

<b>Change bias towards PPM</b>	<b>Size</b>	<b>Techniques</b>
Missionaries	5%	<ul style="list-style-type: none"><li>• Active involvement in initiative</li></ul>
Early adopters	15%	<ul style="list-style-type: none"><li>• Pilot involvement</li><li>• Training</li><li>• Rewards &amp; encouragement</li></ul>
Conservatives	70%	<ul style="list-style-type: none"><li>• Training</li><li>• Demonstrate the benefits</li><li>• Coaching</li></ul>
Holdouts	10%	<ul style="list-style-type: none"><li>• Training &amp; coaching</li><li>• Enforcement</li></ul>

# SUMMARY

- + Understand why PPM initiatives fail so you know what to watch out for
- + Understand effective PPM change management
- + Ensure you have good executive sponsorship
- + Prepare for perceived negative impacts of various roles, e.g. functional managers & project teams, know some selling points
- + Keep in mind the tips I shared

# THANK YOU!

For more information visit

- [www.eclipseppm.com](http://www.eclipseppm.com)
  - Future Webinars
  - Product Demos
  - White Papers

For Questions or Comments:

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PDU Information:

- **PDU Activity Number: 2750-031516**



QUESTIONS?

EclipsePPM  
by upland