Required Project Summary

# prosci certification program pre-work

During the change management certification program, you will be working on a real-life project that is currently underway or planned in your organization. If you are currently in-between projects please bring one from your past. You will be applying the methodology and tools from the program to your project. The output from this project work includes deliverables that you can use when you return from the training. You will need to submit your project summary to [publicsessions@teammax.cc](mailto:publicsessions@teammax.cc?subject=Pre-work%20Project%20Summary%20Sheet) two weeks before the program. *If you are attending with a team, the whole team will need to prepare and submit one summary.* Your project summary should include:

* **Name of the project.**
* **Project description, background, scope and objectives.**
* **Areas or groups in the organization impacted by the change.**
* **Primary sponsor** (the business leader who is in a position to authorize and fund the change, and has sufficient power and control to implement the change).
* **Key managers and stakeholders.** (the group of managers and business leaders that have employees who are directly impacted by the change and/or have control over the people, processes or systems that are affected by the change).
* **Your PCT scores for your project.** Using page three in this document you can determine the PCT Scores. We will need each score for: Leadership and Sponsorship, Project Management and Change Management.

One word of guidance: many participants are involved in very large change projects spanning the entire organization. Keep in mind that we pack a lot of learning into three short days, so you might not have time to tackle every part of a large project. You may want to consider one element or phase of your change project that you can use as a learning vehicle. Then after the program you can build the plan for the remaining pieces. For example, if your change impacts every business unit, division, or directorate in your organization, you may want to consider focusing on only one of those for the program. If your change has multiple components or objectives, you may wish to work on one of those. It helps if you work on the one you have the most knowledge about, as you’ll be doing assessments on the leaders, managers, employees, and organizations involved.

Project Summary Template

Name of the project:

Project description:

Project objectives (business objectives and success measures):

Project scope (groups in the organization impacted by this change):

Primary sponsor (initials):

Key managers and stakeholders (initials):

The PCT scores for your project:

\_\_\_\_ Leadership / Sponsorship

\_\_\_\_ Project Management

\_\_\_\_ Change Management

Prosci® PCT™ Assessment

*Rank each factor on a 1-3 scale. 1 = inadequate; 2 = adequate; 3 = exceptional.*

|  |  |
| --- | --- |
| **Leadership/sponsorship factor assessment** |  |
| 1. The change has an executive sponsor. |  |
| 2. The executive sponsor has the necessary authority over the people, processes and systems to authorize and fund the change. |  |
| 3. The executive sponsor is willing and able to build a sponsorship coalition for the change and is able to manage resistance from other managers and supervisors. |  |
| 4. The executive sponsor will actively and visibly participate with the project team throughout the entire project. |  |
| 5. The executive sponsor will resolve issues and make decisions relating to the project schedule, scope and resources. |  |
| 6. The executive sponsor can build awareness of the need for the change (why the change is happening) directly with employees. |  |
| 7. The organization has a clearly defined vision and strategy. |  |
| 8. This change is aligned with the strategy and vision for the organization. |  |
| 9. Priorities have been set and communicated regarding this change and other competing initiatives. |  |
| 10. The sponsor will visibly reinforce the change and celebrate successes with the team and the organization. |  |
| *Score: (total possible is 30)* |  |

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| --- | --- |
| **Project management factor assessment** |  |
| 1. The change is clearly defined including what the change will look like and who is impacted by the change. |  |
| 2. The project has a clearly defined scope. |  |
| 3. The project has specific objectives that define success. |  |
| 4. Project milestones have been identified and a project schedule has been created. |  |
| 5. A project manager has been assigned to manage the project resources and tasks. |  |
| 6. A work breakdown structure has been completed and deliverables have been identified. |  |
| 7. Resources for the project team have been identified and acquired based on the work breakdown structure. |  |
| 8. Periodic meetings are scheduled with the project team to track progress and resolve issues. |  |
| 9. The executive sponsor is readily available to work on issues that impact dates, scope or resources. |  |
| 10. The project plan has been integrated with the change management plan. |  |
| *Score: (total possible is 30)* |  |

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| --- | --- |
| **Change management factor assessment** |  |
| 1. A structured change management approach is being applied to the project. |  |
| 2. An assessment of the change and its impact on the organization has been completed. |  |
| 3. An assessment of the organization's readiness for change has been completed. |  |
| 4. Anticipated areas of resistance have been identified and special tactics have been developed. |  |
| 5. A change management strategy including the necessary sponsorship model and change management team model has been created. |  |
| 6. Change management team members have been identified and trained. |  |
| 7. An assessment of the strength of the sponsorship coalition has been conducted. |  |
| 8. Change management plans including communications, sponsorship, coaching, training and resistance management have been created. |  |
| 9. Feedback processes have been established to gather information from employees to determine how effectively the change is being adopted. |  |
| 10. Resistance to change is managed effectively and change successes are celebrated, both in private and in public. |  |
| *Score: (total possible is 30)* |  |

Prosci Change Definition Checklist:   
A Precursor to the Change Management Process

In order to apply change management, you must have a change identified. Rather than visions or objectives – like “improving our culture” or “becoming more competitive” – you need a formal and defined change as an input to the change management process. The checklist below helps to ensure you have addressed (or at a minimum considered) the necessary starting point for applying change management on your change initiative.

**Phase 1:  
Preparing for change**

**Phase 2:  
Managing change**

**Phase 3:  
Reinforcing change**

**Change Management Process**

**Input**

**Output**

A change to how the business operates (project or initiatives) that requires employees to do their jobs differently

Employees adopt the change  
Employees realize the solution

Employees are proficient

=

Business results are achieved

Change Definition Checklist:

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Preparation task** | **Completed** | **In progress now** | **Not started yet** | **N/A** |
| Alignment with organizational vision defined |  |  |  |  |
| Project outcomes clearly defined |  |  |  |  |
| Business processes designed |  |  |  |  |
| Technology or systems designed |  |  |  |  |
| Organizational structure designed or modified |  |  |  |  |
| Impacted groups identified |  |  |  |  |
| Job roles defined |  |  |  |  |
| Job descriptions written or modified |  |  |  |  |
| Implementation start date set |  |  |  |  |
| Implementation end date set |  |  |  |  |
| Measurable objectives defined |  |  |  |  |
| Performance measures designed |  |  |  |  |
| Compensation program modified |  |  |  |  |
| Performance appraisal process modified |  |  |  |  |
| Incentive systems designed |  |  |  |  |