Managing the portfolio of change

Tim Creasey
Prosci, Director of R&D
www.change-management.com
Agenda

• Change saturation

• Change Portfolio Management
What are the chances that, amongst all the mess, this will be a High-Impact Change?
Change saturation
When:

Change disruption

> Change capacity

How much is going on?

How much can we handle?
Saturation foundation: Why it happens?

• No one has a high-level view of the entire portfolio of change and the collective impact
Saturation foundation:
Why it happens?

Project teams are focused solely on their solution ("key")

Employees are the ones who feel the brunt
Saturation foundation: Why it happens?

• Change velocity on the rise
  – Frequency
  – Number
  – Size
  – Importance

• Over $\frac{3}{4}$ of 2009 study participant expect an increase in change over the next two years
Benchmarking results: expected change in next two years

* From Prosci’s 2009 benchmarking study
Saturation consequences

• Individual behaviors

• Projects and project teams

• Organizational symptoms

What costs of change saturation have you seen in your organization?
Levels of saturation

* From Prosci’s 2009 benchmarking study
Prosci Change Saturation Model

Change saturation

<table>
<thead>
<tr>
<th>Change capacity</th>
<th>Change disruption</th>
</tr>
</thead>
<tbody>
<tr>
<td>Culture</td>
<td>Number of changes</td>
</tr>
<tr>
<td>History</td>
<td>Disruption of each</td>
</tr>
<tr>
<td>Structure</td>
<td>Nature of the change</td>
</tr>
<tr>
<td>Perceived need for change</td>
<td>Change management effectiveness</td>
</tr>
<tr>
<td>Change mgmt competency</td>
<td></td>
</tr>
</tbody>
</table>
Change Portfolio Management
Why we need Portfolio Management?

• Change saturation
  – Individual
  – Projects
  – Organization

• Change collision
  – Funding
  – Human resources for project/change teams
  – Timeframe
  – Mindshare
  – Collective impact on people in the org
Why we need CHANGE Portfolio Management?

• There has been some progress in portfolio management coming out of the PM world

• A portfolio view must go beyond a list

• The portfolio perspective must address the cumulative and collective impact of the changes on the people in the organization
Goal of Change Portfolio Management:

– Bring **clarity** to the entire portfolio of change impacting the organization.

– Utilize a process for **understanding**, **evaluating** and **managing** the portfolio.
Change Portfolio Management Process

- Step-by-step process for creating portfolio perspective

- Requires you to wear your “Sherlock Holmes” hat

<table>
<thead>
<tr>
<th>Identify</th>
<th>Scope the portfolio</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Identify changes</td>
</tr>
<tr>
<td></td>
<td>Identify groups</td>
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<tr>
<td>Investigate</td>
<td>Change details</td>
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<td></td>
<td>Change assessments</td>
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<td></td>
<td>Groups impacted</td>
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<tr>
<td>Analyze</td>
<td>Heat Maps</td>
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<tr>
<td></td>
<td>Plot</td>
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<tr>
<td></td>
<td>Portfolio Dashboard</td>
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<tr>
<td>Act</td>
<td>Identifying risks</td>
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<tr>
<td></td>
<td>Presenting the portfolio</td>
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<td></td>
<td>Acting on the portfolio</td>
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<tr>
<td>Monitor, Manage and Control</td>
<td></td>
</tr>
</tbody>
</table>

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Identify:
Scope the portfolio

Scope of change portfolio

- Entire enterprise
- Single division
- Change source (e.g. IT changes)
Identify: Identify changes

**Identify**
- Scope the portfolio
- Identify changes
- Identify groups

**Investigate**
- Change details
- Change assessments
- Groups impacted

**Analyze**
- Heat Maps
- Plot
- Portfolio Dashboard

**Act**
- Identifying risks
- Presenting the portfolio
- Acting on the portfolio

Scope of change portfolio

Changes
Identify: Identify groups

Scope of change portfolio

Changes

Groups

1 2 3 4 5 6 7 8

A B C D E F

Identify
Scope the portfolio
Identify changes
Identify groups

Investigate
Change details
Change assessments
Groups impacted

Analyze
Heat Maps
Plot
Portfolio Dashboard

Act
Identifying risks
Presenting the portfolio
Acting on the portfolio

Monitor, Manage and Control
Investigate:
Change details

Identify
- Identify portfolio
- Identify changes
- Identify groups

Investigate
- Change details
- Change assessments
- Groups impacted

Analyze
- Heat Maps
- Plot
- Portfolio Dashboard

Act
- Identifying risks
- Presenting the portfolio
- Acting on the portfolio

Monitor, Manage and Control

- Who is involved?
- How big is it?
- How much impact?
- When will it cause disruption?
Investigate: Change assessments

- Identify
  - Scope the portfolio
  - Identify changes
  - Identify groups

- Investigate
  - Change details
  - Change assessments
  - Groups impacted

- Analyze
  - Heat Maps
  - Plot
  - Portfolio Dashboard

- Act
  - Identifying risks
  - Presenting the portfolio
  - Acting on the portfolio

- Monitor, Manage and Control

✓ Risk evaluation
  - Small change / Large change
  - Change ready / Change resistant

✓ Project health
  - Leadership / Sponsorship
  - Project Mgmt
  - Change Mgmt
Tool: Change Scorecard

• One-pager for each change with common data set of details and assessment results
Investigate:
Groups impacted

Identify
- Scope the portfolio
- Identify changes
- Identify groups

Investigate
- Change details
- Change assessments
- Groups impacted

Analyze
- Heat Maps
- Plot
- Portfolio Dashboard

Act
- Identifying risks
- Presenting the portfolio
- Acting on the portfolio

Scope of change portfolio
Changes
Groups

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Investigate:
Groups impacted

Scope of change portfolio

Identify
Scope the portfolio
Identify changes
Identify groups

Investigate
Change details
Change assessments
Groups impacted

Analyze
Heat Maps
Plot
Portfolio Dashboard

Act
Identifying risks
Presenting the portfolio
Acting on the portfolio

Monitor, Manage and Control
Investigate:
Groups impacted

- Identify
  - Scope the portfolio
  - Identify changes
  - Identify groups

- Investigate
  - Change details
  - Change assessments
  - Groups impacted

- Analyze
  - Heat Maps
  - Plot
  - Portfolio Dashboard

- Act
  - Identifying risks
  - Presenting the portfolio
  - Acting on the portfolio

Scope of change portfolio

Changes

Groups

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### Tool: Group Impact Matrix

#### Microsoft Excel - Group Impact Matrix v15

<table>
<thead>
<tr>
<th></th>
<th>A</th>
<th>AP</th>
<th>AQ</th>
<th>AR</th>
<th>AS</th>
<th>AT</th>
<th>AU</th>
<th>AV</th>
<th>AW</th>
<th>AX</th>
<th>AY</th>
<th>AZ</th>
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<th>BD</th>
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<td>Change 46</td>
<td>Change 47</td>
<td>Change 48</td>
<td>Change 49</td>
<td>Change 50</td>
<td>Changes impacting this Group</td>
<td>Impact score for this Group</td>
<td>Impact score as % of max impact score</td>
<td>Heat map score (quintile)</td>
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</tbody>
</table>
Analyze:

- **Identify**
  - Scope the portfolio
  - Identify changes
  - Identify groups

- **Investigate**
  - Change details
  - Change assessments
  - Groups impacted

- **Analyze**
  - Heat Maps
  - Plot
  - Portfolio Dashboard

- **Act**
  - Identifying risks
  - Presenting the portfolio
  - Acting on the portfolio

**Making sense of the portfolio**
Heat Map build

Scope of change portfolio

Changes
A B C D E F

Groups
1 2 3 4 5 6 7 8
### Heat Map build

<table>
<thead>
<tr>
<th></th>
<th>Change A</th>
<th>Change B</th>
<th>Change C</th>
<th>Change D</th>
<th>Change E</th>
<th>Change F</th>
</tr>
</thead>
<tbody>
<tr>
<td>Group 1</td>
<td></td>
<td>3</td>
<td></td>
<td></td>
<td></td>
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</tr>
<tr>
<td>Group 2</td>
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<td>Group 3</td>
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<td>Group 4</td>
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<td>Group 5</td>
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<tr>
<td>Group 6</td>
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<tr>
<td>Group 7</td>
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<td>3</td>
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<tr>
<td>Group 8</td>
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</tbody>
</table>
Heat Map build

CEO

Group 1

Group 2

Group 3

Group 4

Group 5

Group 6

Group 7

Group 8

Little or no change

Fully engaged in change

Saturated and disrupted environment
1 Saturated and disrupted environment
2 Little or no change
3 Fully engaged in change

Tool: Change Heat Maps

President / CEO

COO

VP IT

VP HR

VP Finance

Director of PMO

Director of HR Consulting

Mgr Staffing

Mgr Benefits

Mgr Performance Mgmt

Mgr IT Helpdesk

Mgr Infrastructure Planning

Mgr Corp IT

Mgr Accounting

Mgr Finance

Mgr Accts Receivable

Mgr Accts Payable

Mgr Cost Accting

BU 1 Mgr Mkting

BU 1 Mgr Sales

BU 1 Mgr Mfging

BU 1 Acct Mgr

BU 1 HR

BU 2 Mgr Mkting

BU 2 Mgr Sales

BU 2 Mgr Mfging

BU 2 Acct Mgr

BU 2 HR

BU 3 Mgr Mkting

BU 3 Mgr Sales

BU 3 Mgr Mfging

BU 3 Acct Mgr

BU 3 HR
Tool: Schedule collision plot

- Change A
- Change B
- Change C
- Change D
- Change E
- Change F
Tool: Plots

- Scope
- Importance
- Disruption

Investment $$$
Tool: Plots

People risk analysis

Change characteristics score

Organization attributes score

Low risk

Medium risk

High risk
Investment vs Risk vs Health

Investment vs Risk vs Health

People risk score vs Investment (in millions)
Real-time portfolio analysis

Cut out the triangles you need to show your project health and plot on the Investment vs Risk vs Health graph in the back of your workbook.
# Real-time portfolio analysis data sheet

<table>
<thead>
<tr>
<th>Project</th>
<th>Inv ($$$)</th>
<th>Risk score</th>
<th>PCT scores</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td>L/S PM CM</td>
</tr>
<tr>
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<td></td>
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</tr>
</tbody>
</table>

**Project**: Name of the project in the portfolio

**Inv ($$$)**: Investment in the project (estimate a value)

**Risk score**: Score between 1 and 9 – in the Portfolio Toolkit, this score comes from the result of two assessments: a Change characteristics assessment and an Organizational attributes assessment. For this exercise, you will assign a value:

<table>
<thead>
<tr>
<th>Small change to change-ready groups</th>
<th>Small change to change-resistant groups OR Large change to change-ready groups</th>
<th>Large change to change-resistant groups</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 = Low –</td>
<td>4 = Medium –</td>
<td>7 = High –</td>
</tr>
<tr>
<td>2 = Low</td>
<td>5 = Medium</td>
<td>8 = High</td>
</tr>
<tr>
<td>3 = Low +</td>
<td>6 = Medium +</td>
<td>9 = High +</td>
</tr>
</tbody>
</table>

**PCT scores**: These scores result from Prosci’s Project Change Triangle assessment which looks at Leadership/Sponsorship, Project Management and Change Management. For this exercise, you will be assigning one of three values:

- Jeopardy (red)
- Alert (yellow)
- Strength (green)
<table>
<thead>
<tr>
<th>&lt;20</th>
<th>High risk / jeopardy – needs immediate action</th>
</tr>
</thead>
<tbody>
<tr>
<td>20-25</td>
<td>Alert / potential risk – needs further investigation</td>
</tr>
<tr>
<td>&gt;25</td>
<td>Strength – should be leveraged and maintained</td>
</tr>
</tbody>
</table>

The diagram illustrates a matrix with categories for Leadership / Sponsorship, Change Management, and Project Management corners. The matrix uses color codes to represent different risk levels: green for strengths, yellow for alert or potential risks, and red for high risks or jeopardy.
# Portfolio Dashboard

**Portfolio Dashboard Changes in portfolio:** 0

For use with Prosci’s Change Portfolio Management Toolkit

## Investment Analysis

<table>
<thead>
<tr>
<th>Metric</th>
<th>Count</th>
<th>% of Portfolio</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total investment in the portfolio</td>
<td></td>
<td>$ -</td>
</tr>
<tr>
<td>% of changes fully funded</td>
<td></td>
<td>NA</td>
</tr>
<tr>
<td>% of changes fully resourced</td>
<td></td>
<td>NA</td>
</tr>
<tr>
<td>Number of &quot;large investment&quot; changes</td>
<td></td>
<td>0</td>
</tr>
<tr>
<td>% of budget in &quot;large investment&quot; changes</td>
<td></td>
<td>NA</td>
</tr>
<tr>
<td>Number of &quot;medium investment&quot; changes</td>
<td></td>
<td>0</td>
</tr>
<tr>
<td>% of budget in &quot;medium investment&quot; changes</td>
<td></td>
<td>NA</td>
</tr>
<tr>
<td>Number of &quot;small investment&quot; changes</td>
<td></td>
<td>0</td>
</tr>
<tr>
<td>% of budget in &quot;small investment&quot; changes</td>
<td></td>
<td>NA</td>
</tr>
</tbody>
</table>

## Scope Distribution

<table>
<thead>
<tr>
<th>Level</th>
<th>Count</th>
<th>% of Portfolio</th>
</tr>
</thead>
<tbody>
<tr>
<td>5 = entire enterprise</td>
<td>0</td>
<td>NA</td>
</tr>
<tr>
<td>4 = multiple divisions</td>
<td>0</td>
<td>NA</td>
</tr>
</tbody>
</table>

## Strategic Importance Distribution

<table>
<thead>
<tr>
<th>Level</th>
<th>Count</th>
<th>% of Portfolio</th>
</tr>
</thead>
<tbody>
<tr>
<td>5 = top 5 projects</td>
<td>0</td>
<td>NA</td>
</tr>
<tr>
<td>4 = critical business initiative</td>
<td>0</td>
<td>NA</td>
</tr>
</tbody>
</table>

## Gap Distribution

<table>
<thead>
<tr>
<th>Level</th>
<th>Count</th>
<th>% of Portfolio</th>
</tr>
</thead>
<tbody>
<tr>
<td>5 = no resemblance to today</td>
<td>0</td>
<td>NA</td>
</tr>
<tr>
<td>4 = dramatically different</td>
<td>0</td>
<td>NA</td>
</tr>
</tbody>
</table>

## People Risk Distribution

<table>
<thead>
<tr>
<th>Level</th>
<th>Count</th>
<th>% of Portfolio</th>
</tr>
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<tbody>
<tr>
<td>High risk quadrant</td>
<td>0</td>
<td>NA</td>
</tr>
<tr>
<td>Medium risk quadrant</td>
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<td>NA</td>
</tr>
<tr>
<td>Low risk quadrant</td>
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</table>

## Project Health from PCT Assessment

<table>
<thead>
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<th>Level</th>
<th>Count</th>
<th>% of Portfolio</th>
</tr>
</thead>
<tbody>
<tr>
<td>Changes with 0 jeopardy areas (red)</td>
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<td>NA</td>
</tr>
<tr>
<td>Changes with 1 jeopardy area (red)</td>
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<td>Changes with 2 jeopardy areas (red)</td>
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<tr>
<td>Changes with 3 jeopardy areas (red)</td>
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## Leadership/Sponsorship Health

<table>
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<th>Level</th>
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<tr>
<td>Leadership/Sponsorship as strength</td>
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<tr>
<td>Leadership/Sponsorship as jeopardy</td>
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## Project Management Health

<table>
<thead>
<tr>
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<tbody>
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<tr>
<td>Project Management as alert</td>
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<tr>
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## Change Management Health

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</tr>
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<td>Change Management as jeopardy</td>
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</tr>
</tbody>
</table>
Act

• Identifying risks
  • Identify
  • Investigate
  • Analyze
  • Act

• Presenting the portfolio
  • Scope the portfolio
  • Identify changes
  • Identify groups
  • Change details
  • Change assessments
  • Groups impacted
  • Heat Maps
  • Plot
  • Portfolio Dashboard

• Acting on the portfolio
  • Identifying risks
  • Presenting the portfolio
  • Acting on the portfolio

Monitor, Manage and Control
Act:
Risks you can identify

• To projects
• To groups
• At points-in-time
• To entire organization
Monitor, Manage and Control

- Projects entering
  - What impact would this initiative have on the current portfolio of change in the organization?

- Projects exiting
  - Removing the change from the portfolio
  - Evaluating change impacts
  - Learning from changes leaving the portfolio

Identify
  - Scope the portfolio
  - Identify changes
  - Identify groups

Investigate
  - Change details
  - Change assessments
  - Groups impacted

Analyze
  - Heat Maps
  - Plot
  - Portfolio Dashboard

Act
  - Identifying risks
  - Presenting the portfolio
  - Acting on the portfolio
Prosci’s new Change Portfolio Toolkit

• The toolkit enables you to:
  – Inventory the change efforts underway in the organization
  – Segment effected groups throughout the organization
  – Map changes to the groups being impacted
  – Collect a common set of data on each initiative
  – Assess the risk and health of each change effort
  – Create Heat Maps to illustrate change saturation
  – Produce numerous plots showing portfolio positioning
  – Identify change efforts, groups and points in time at risk
Someone needs to make sense of the portfolio of change.