



Successful Adoption of PPM using CA Clarity PPM™

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Abstract

- Managing organizational change is critical for a successful Clarity PPM implementation
- Provide a systematic approach and framework for managing the changes associated with a Clarity PPM implementation
- Discuss the success factors of a Clarity PPM implementation, and how organizational change management can be essential for building user acceptance and a shared vision of a Clarity PPM Implementation
- An adoption approach that will endure for the duration of the PPM implementation and ensure that the cultural changes bring the ultimate benefits of PPM to the organization

Summary

This white paper describes how some of the leading organizational change management approaches from John Kotter, Jim Collins, Peter Senge, Jerry Brightman, and Kerry Patterson can be utilized to increase the likelihood of complete success of a Clarity PPM implementation.

The Value of Clarity PPM to an Organization

The following are some of the reasons people will buy Clarity PPM to accelerate their PPM capability and provide benefits to an organization:

- Easy alignment with Project methodology
- Project Demand can be managed
- Standard project templates for project planning
- Planning Resources
- Manage Project Risks and Issues
- Future portfolio planning
- Easy configuration to Company processes

The Challenges of a Clarity PPM Implementation

Even though Clarity PPM provides significant potential benefits for an organization some organizations fail to realize the full benefits of the enterprise application because the organization is not prepared to change to adapt to the cultural changes that are associated with the new integrated PPM process.



Select questions that need to be asked to ensure full adoption are:

- How to manage the Organizational change systematically?
- How to integrate the change management process into the implementation project plan?
- What changes bring the most value to the organization?
- How
- How to overcome resistance to change?
- How do people buy-in to CA Clarity?

Systematic Approach to Organizational Change Management

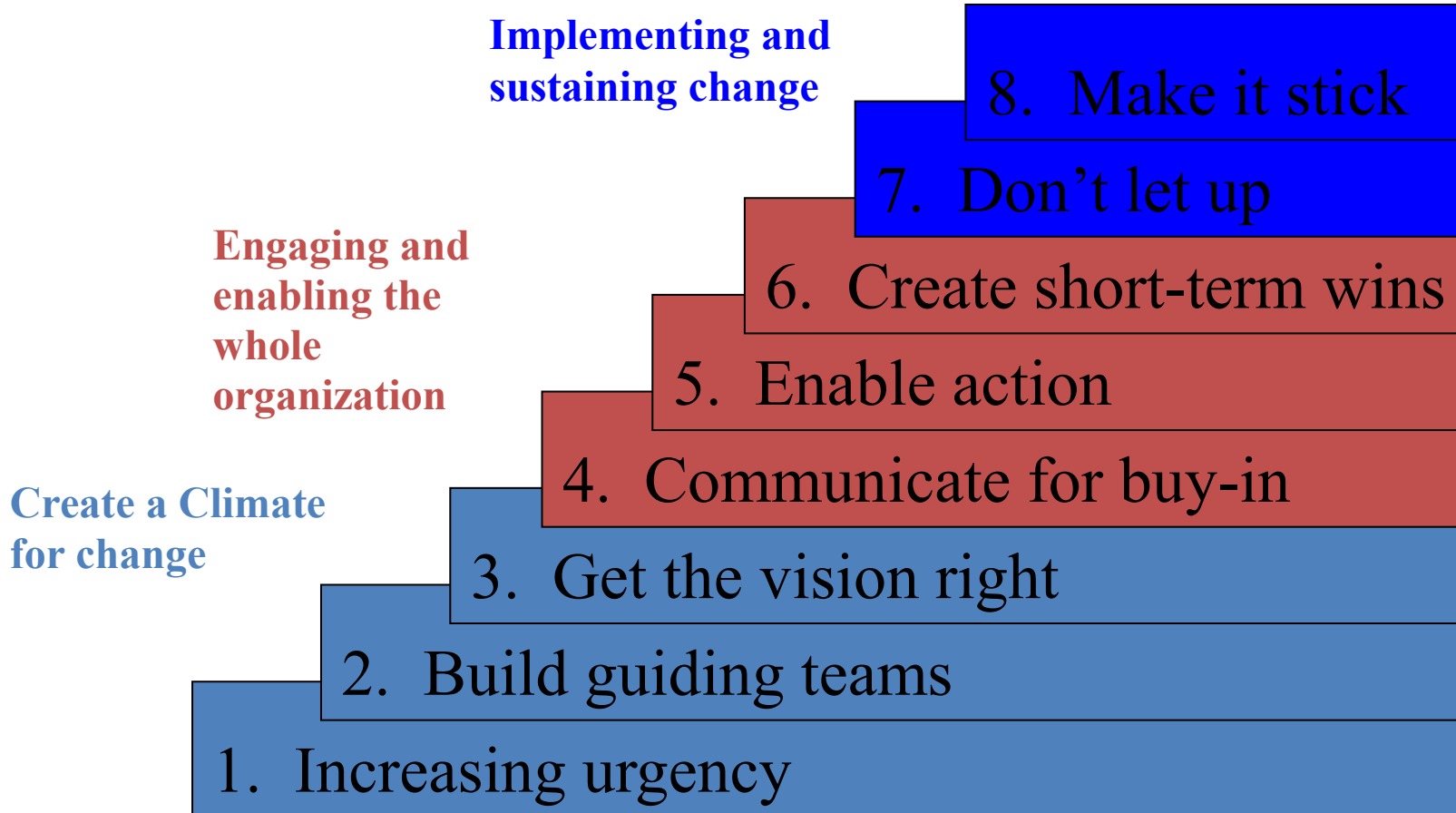
The challenge with implementing an effective organization change management strategy, that will maximize the process adoption and lead to the full potential results from Clarity, is providing a tangible, systematic approach to managing the change. Many organizational change management fail because they cannot be translated into specific tangible steps that can be executed in a plan. Also, the plans might include some but not all of the concepts below. Any missing pieces could result in results that are less than expected. The following are essential for a complete, systematic approach Organizational change Management:

- A way to logically plan for change
- Use a Standard Project Management Methodology
- Building a case for change and increasing urgency
- Building the guiding teams
- Creating the CA Clarity / PM vision
- Celebrating short-term wins

John Kotter is an industry leader in Organizational Change Management. In his book: [Heart of Change](#), he describes the essential steps for a successful change.



John Kotter: The Heart of Change



Creating a Climate of Change

The foundation of a successful change is to create the Climate for change. People need to see the value in the change in order for them to move in the new direction of the change.

Increasing Urgency

“Without urgency, large scale change can become an exercise in pushing a gigantic boulder up a very tall mountain”. It is important for change to succeed that the behaviors of complacency, self-protection, and pessimism about the change be addressed head on. In order to feel motivated to contribute to the effort, everybody involved needs to believe the change is critical. This step is not only a concrete business case. In order to change people need to see then feel the change. Leaders need to be acutely aware of built up fear, anger, or complacency in an organization. There are three important steps in creating a shared sense of urgency.



- 1. Build a case for change that clearly identifies the gap between current organization PPM performance and PPM desired performance:**
 - Clarity PPM change is critical to success
 - Gain rational buy-in through charts and business case for PPM and Clarity
 - An awareness campaign – what is PPM and Clarity?
 - Describe the situation and problem with staying in the current PPM maturity level
 - Describe the benefits, reward, and opportunities for the PPM Clarity Implementation
 - Solidify scope and benefits of CA Clarity Implementation
- 2. Identify the source of organizational complacency:**
 - Look for the warning signs of complacency
 - Define an action plan to address the complacency identified
 - Use techniques such as “Crucial Conversations” by Kerry Patterson to address complacency
- 3. Clarifying the roles of leaders and managers in implementing the new PPM initiative:**
 - Leaders role is to make the need for Clarity PPM change apparent to the entire organization
 - Communicating a compelling story and engaging all stakeholders in a dialogue about the need for change
 - Enable managers to perform their change related roles and responsibilities
 - Invite ideas and suggestions for improvement

Outcomes

Successfully increasing urgency will mean gaining converts through logic and emotion:

- Gain rational buy-in – making a case for change based on solid data
- Gain emotional buy-in – by providing a compelling story or picture that catches people’s attention and generates a high level of energy throughout the organization

Building Guiding Teams

Strong guiding teams provide the energy, support, speed, and sense of urgency for the Clarity PPM implementation to succeed. Three critical elements in creating effective guiding teams for the Clarity PPM implementation are:

- 1. Engage the right people:** The Clarity PPM implementation needs a number of guiding teams to be successful. Also, the team members must have the necessary knowledge, skills, perspective and commitment to tackle the challenge.



2. Setting Clear team goals:

- Provides a shared sense of purpose
- Clear team roles
- Effective team processes such as team meetings, planning, problem solving, decision making, conflict resolution
- Creating strong relationships between team members
- Effective interface management with other teams

3. Develop a climate of trust and commitment within the teams:

- Trust, doing what you said you will do, and exceeding expectations, is the foundation of the successful team
- Deep commitment to a common goal drives the common purpose of the team

Outcomes

The results of focusing attention on guiding teams are:

- Composed of individuals with sufficient power, influence, expertise, credibility, and leadership ability to drive the Clarity PPM change
- Share a common understanding of the Clarity PPM change initiative goals and are clear about the roles and responsibilities needed to make the change succeed
- Built on trust with a strong emotional commitment to a successful Clarity PPM implementation
- Work at a high level of performance

Get the vision right

This step involves creating a clear, inspiring, achievable picture of the future of the PPM Clarity Implementation. It is important that this vision describe the future key behaviors needed to achieve the vision. As a result the strategies and key performance metrics can be created to support the vision. The four phases of developing a vision are:

- 1. Clarifying why a vision is necessary?** The vision allows everyone involved in the Clarity PPM implementation to see the need in a way that is clear and motivation. The vision must make people *feel* the risk of maintaining the status quo or the positive possibilities of the future
- 2. Developing and analyzing a vision:** Collect and analyze data related to the PPM Clarity change. Involve stakeholders throughout the organization in development and feedback about the vision



Outcomes

- A picture of change that is compelling and focused
- Clear understanding of the behaviors that need to be added, removed, or maintained in order to achieve the vision
- A sound strategy that defines how the vision will be achieved and demonstrates the feasibility of the goals

Engaging and Enabling the Whole Organization

Communicate for Buy-In

The goal of this step is to get as many people as possible acting to make the vision a reality. The objective is to influence people to think and act in accordance with the new PPM Clarity direction.

1. **Initially communicating the vision:** it is essential to the communication effort that feedback is received about the level of understanding and acceptance of the vision through focus groups, and other feedback processes.
2. **Engaging in continuous dialogue with the stakeholders:** The guiding teams need continuous dialogue with all stakeholders to build commitment and detect resistance.
3. **Enrolling stakeholders in the Clarity PPM implementation:** Managing stakeholder enrollment and commitment is complex because different groups have different communication needs. Not everybody needs or wants to move along the change continuum at the same speed. It is important to know where each stakeholder group is on the enrollment continuum and develop a plan to move them to the level of commitment needed for the project.

Outcomes

- Shared picture of a desirable future
- Motivate people to take action and spark the change
- Minimize resistance to change
- Belief in the change effort to enable commitment

Enable Action

If you want the guiding team and stakeholders to carry out the vision you have to provide them with the means to do so. The purpose of this step is to enable a broad base of people to take action by removing as many barriers to the Clarity PPM implementation as possible.



- 1. Busting Barriers that block people from carrying out the Clarity PPM vision:** The four major barriers that need busting are:
 - Structure – create a structure for the initiative that is consistent with the vision
 - Lack of skills – Define the new behaviors and identify skills, abilities, and attitude that will succeed. Training at the right time, for the right skills, and using the right approach.
 - Organizational systems – make sure that the performance management, compensation etc do not hamper the adoption of Clarity PPM
 - Resistant leaders and managers – confront resistance directly, engaging in honest discussions. Provide resisters the opportunity to resolve problems.
- 2. Encourage people to take risk and be innovative:** Once the barriers to change have been removed the leader's job is not to foster a new way of thinking and behaving.

Outcomes:

- Individuals receive the PM and Clarity training needed to be successful
- Managers commit time and resources necessary to build the system and provide training
- Organizational processes and systems aligned to new PM processes
- Performance measures are aligned to enable people to see how their performance is moving the successful Clarity PPM implementation.

Create Short term wins

Short terms wins are critical to building credibility to sustain the change effort over time. They provide the tangible evidence that the Clarity implementation is paying off. The wins also energy and inspire the team to continue the effort.

- 1. Planning for visible improvements in performance**
- 2. Achieving those wins**
- 3. Communicating the wins visibly and convincingly**
- 4. Embedding the learning into the plan going forward**

Outcomes

- Short-term wins build the Project credibility
- Needed to sustain the change effort
- Confidence that CA Clarity success based on concrete evidence
- Momentum for the CA Clarity implementation
- More people becoming active supporters and helpers
- Guiding teams with renewed motivation for CA Clarity, inspiring others to act



Implementing and Sustaining Change

It is not unusual for any project to lose focus, especially one that has so many focus areas as a Clarity PPM implementation. This step involves not easing up on the initial successes and continuing to focus on the vision.

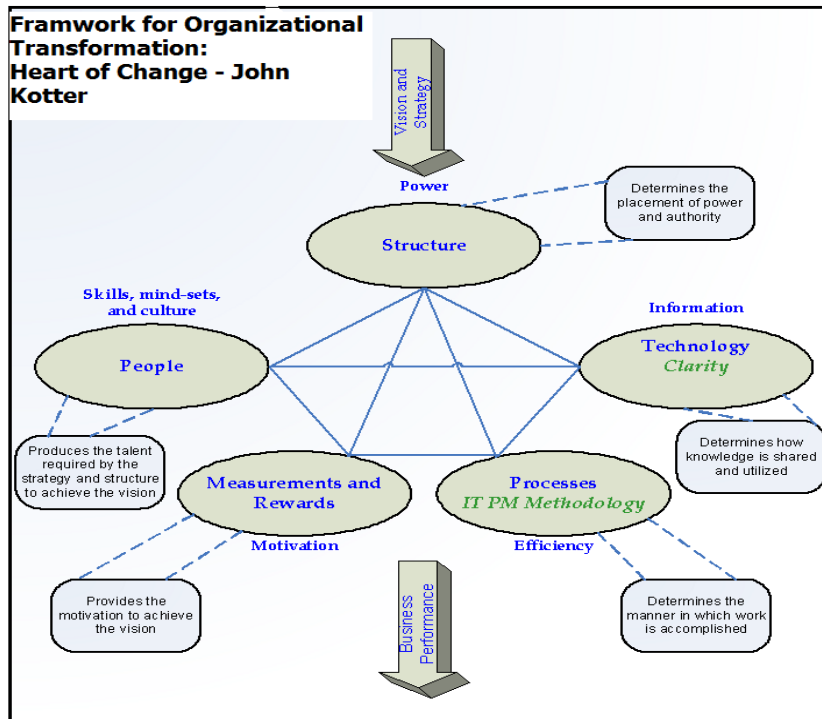
Don't let up

1. Leverage the momentum and credibility gained from short-term wins
2. Align and monitor key organization areas
3. Maintain the momentum for the PPM Clarity change
4. Ensure the change is reaching all levels of the organization
5. Sustain the involvement and support of leaders

Outcomes:

- Reinvigorated Project provides accomplishment and optimism
- Addition and development of new people
- Sustained leadership from senior people
- Leadership reinforce the need for change and are perceived as actively involved in the change

The following diagram describes the integrated nature of alignment of Structure, People, Measurement and Rewards, Processes, and Technology.





Make it stick

Once the Clarity PPM implementation has had some success and people have started to use the tool and changed their process and behavior, these new behaviors and processes need to be woven into to culture of the organization. If the organization culture absorbs the new systems it will not feel like extra effort by the stakeholders and they will wonder how they operated without Clarity.

1. **Achieving tangible results as quickly as possible**
2. **Showing *how* the change is working, and *why* the old ways won't work**
3. **Measuring and supporting the sustained performance**
4. **Ensuring the leadership will support and model the new behavior**

Outcomes:

When the Clarity PPM change is “sticking” you will witness the following:

- An organization infrastructure that develops and reinforces correct practices and behaviors for continuous PPM related results
- The Clarity PPM processes and behavior associated with the new direction is embedded on the new culture

Conclusion

A systematic approach to organization change management is vital for a successfully Clarity PPM implementation. The approach defined in this white paper has been proven to be successful in several types of large Clarity PPM transformational change efforts.