

Integration of project-based management and change management: Intervention methodology

¹Parker, D.W., ¹Charlton, J., ¹Ribeiro, A., ²Pathak, R.D.

¹The University of Queensland Business School, Queensland 4072 Australia.

²The Graduate School of Business, The University of the South Pacific, Suva, Fiji.

David Parker is a senior lecturer with a research focus in project-based management. He is a senior lecturer in the Strategy Group at UQ Business School. He has taught and carried out research in India, PNG, Fiji, Cook Islands, China and Europe. d.parker@business.uq.edu.au

Joshua Charlton is a postgraduate researcher in project management. Josh seeks to apply the skills and knowledge gained through research as a professional project manager and consultant. joshcharlton@gmail.com

Ana Ribeiro is a postdoctoral student. She worked on change management in Brazil at Dataprev, a social security company of Brazil Government; and did 6 months internship in planning and control at Vale Australia, a mining company located in Brisbane, Australia. Ana.ribeiromvilar@uconnect.edu.au

Raghuvar D. Pathak is Head of the Graduate School of Business and Director of MBA programme at the University of the South Pacific, Suva, Fiji. He has more than 25 years of postgraduate (MBA) teaching experience and has published numerous research-based papers. Raghuvar.pathak@usp.ac.fj

¹Corresponding author: d.parker@business.uq.edu.au

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Abstract

The successful management of change using a project-based intervention is crucial for any organization to succeed in the highly competitive and continuously evolving global business environment. Whilst a number of theories of change management are widely accepted, literature suggests they are falling short of their endeavors as a result of the theories lacking a useful framework to successfully plan, implement and manage change. This article critically argues the value of project-based management in the change management process with particular focus on PRINCE2 and PMBoK. As such, change management can be considered a project and utilize project-based processes to successfully implement change.

Keywords: Change management, project management, project processes, change models, PMBoK, PRINCE2

1.0. Introduction

Demand from the business field for change management (CM) literature and techniques is increasing as managers seek new processes and tools for implementing a perfect change (Paton & McCalman, 2008). Many managers are in awe over the reported failure rates for change initiatives as high as 70 per cent (Balogun and Hope Hailey, 2004).

CM is considered a broad theme encapsulating such terms as total quality management, reengineering, rightsizing, restructuring, cultural change, and business turnaround; amongst others. No matter what term is used to describe the management of the change, the

underlying objective is to make fundamental improvement in how business is undertaken in order to meet the demands of a changing market environment (Kotter, 2007). Kotter (1990) stresses the importance of change management as a process and not a single event, and that change management emphasizes change advances through stages.

This concept of CM as a process is reinforced in a definition, describing it as “a process of continually renewing organisations direction, structure, and capabilities to serve the ever changing needs of external and internal customers” (Moran and Brightman, 2001, p. 111). This view is shared across the majority of accepted CM models in use today, which identify CM as either a process or set of steps. It should be noted however, the sequence of actions an organisation should apply to accomplish change initiatives can be quite abstract and hard to apply (Bridges, 1991). Below is a brief summary of key authors that explore CM and are able to offer a “more practical guidance to managers” (Todnem, 2005, p. 375) in regards to implementing change initiatives. These models will be utilized as a platform for demonstrating the usefulness of integrating project-based processes into an organisational change project.

Kanter (1992) proposes the *Ten Commandments for Executing Change* – see table 1. Kanter argues that analyzing the organisation and its need for change is the first step in the change process, followed by the creation of a common vision and direction. From this point, separating the organisation from the past should be undertaken and to create a sense of *urgency*. In this model, to establish strong leadership and political sponsorship are also crucial steps prior to crafting the implementation plan. It is then important to develop enabling structures, followed by communicating, involving people and being transparent. The final step is to institutionalize change (Kanter, 1992).

The second notable CM model is Kotter’s *Eight-Stage Process for Successful Organisational Transformation* (1996). This process commences with the need for stating a sense of urgency

and creating a guiding coalition. Communicating a vision and strategy is the next process followed by developing a broad-based action plan to empower those involved. The next process involves generating short-term wins which can be celebrated to enhance motivation. In Kotter's (1996) model, consolidating gains prior to progressing to produce more change is required so the final process of anchoring new approaches in the culture can be achieved.

The third CM model is Luecke's *Seven Steps* (2003) which commences by recommending mobilizing energy and commitment through joint identification of business problems and their solutions. Next is developing a shared vision of how to organize and manage for competitiveness. Leadership should be identified to guide teams towards results. This model espouses starting change at the periphery and not letting it spread throughout the organisation without it being directed from the top. Once results are achieved, changes should be formalized into policies, systems and structures. Whilst the process of change is being implemented, Luecke (2003) highlights the importance of monitoring and adapting strategies to address any issues encountered in the change process.

It can therefore be argued that CM is the utilization of processes to control an organisational change effort. Whilst the CM literature articulates processes for managing change, these are largely focused on the people-issues ('soft') of change to achieve the required business outcomes.

2.0. Managing Change in a Changing Environment

From a historic perspective, emphasis on CM has developed progressively over the last 50 years, after initially being mistrusted (Turner, 2009). The reasoning for this undervaluing has been attributed to the necessity of stability and certainty for highly structured businesses to operate. However, mass production in the 1960s followed by rapid changes in technology, and the integration of global business, has demanded these highly-structured organisations

change or be left behind (Turner, 2009). It is argued that winners are the ones able to respond better to “the conditions actually encountered” (Turner, 2009, p. 24). As external change is not under control of the organisation, an understanding of the processes of change combined with tools and techniques can be regarded as an approach to tackle changing business reality. Hughes (2007) stresses that academics developing mainstream CM theory, have not prioritized on adequate tools and techniques to apply in the dynamic business environment. Such tools and techniques may vary, but there is a tendency to utilize models from (Kotter, Kanter, Luecke, *ibid*). However, even these models fail to a degree in clearly interpreting the techniques or tools to accomplish each step. One could argue this shortfall in appropriate tools and techniques would be a significant challenge to implementing change initiatives, and quite possibly is related to the significant failure rate of interventions to bring about change. Hughes (2007) points out some possible reasons for the academic negligence towards CM tools and techniques, starting from the lack of a common definition of what would be a CM tool. Conversely, there appears to be a need for building a framework of what is meant by CM practice. This could be achieved by developing a body of knowledge for the CM field similar to that of the Project Management Body of Knowledge for professional project managers. Furthermore, expanding the applicability of change management to improve its effectiveness in implementation could strengthen the CM identity. Baca (2005, p.4), for example, considers CM by its applicability: “change management is just that – a tool that you use to manage change”. In addition, Baca (*ibid*, p. 4) associates CM to “an integral part of the generally accepted principles covered in the PMBOK Guide (PMI, 2004)” and in this sense she reduces CM to a practical tool.

3.0. Project-based Management

The desire and necessity to keep pace with the changing business environment has caused many companies to shift from being operations-focused to being project-driven (Jarocki, 2011). Turner (2009) argues that continuous change in organisations nowadays requires project-oriented management as the *control and monitor* model is no longer sufficient for businesses to maintain a competitive framework. Instead of attempting to guarantee a stable environment to operate, companies seek tools that enable them to maintain the required flexibility and adaptability they need to answer in a timely manner to the market's volatility and changing environment.

Approximately thirty per cent of the global economy now utilizes project-based management (Anbari et al, 2008), which underscores the continual creation of temporary project-based endeavours that are becoming more common and valued by organisations. Whilst there are an abundance of definitions of the term 'project', *The Definition Guide to Project Management* by Sebastian Nokes (2007, p.17) defines a project as "a temporary endeavour, having a defined beginning and end (usually constrained by date, but can be by funding or deliverables) undertaken to meet unique goals and objectives, usually to bring about beneficial change or added value". Of particular interest within this definition is the concluding statement: *to bring about beneficial change or added value*. Clearly, projects are invariably initiated to bring about change.

The Project Management Institute describes a project within the Guide to Project Management Body of Knowledge (PMI, 2008, p.26) as "a temporary endeavor undertaken to create a unique product, service or result".

The UK Government developed PRINCE2 (OGC, 2005, p.21) has two definitions of a project which are largely aligned with the PMBoK definition, namely: "a management environment that is created for the purpose of delivering one or more business products according to a

specified business case”; and “a temporary organisation that is needed to produce a unique and pre-defined outcome or result at a pre-specified time using pre-determined resources”.

All these definitions identify a project as being temporary in nature, with the project structure being established for the sole purpose of accomplishing some clearly defined changed outcome. Resources are assembled and coordinated to achieve this new desired state. Once the change outcome is accomplished, projects are disbanded. Therefore projects are a vehicle of change to take the organisation from an existing state to a planned future state.

Whilst one cannot devalue the importance in appropriately defining what a project is, it is essentially a vision to reach some desired future state. It is management of the project which is critical above all (Kotter, 2011; Lewin, 1947). The management of the project converts the project vision for change into a reality (Rankins, 2007). PM is the disciplined application of knowledge, skills, tools and techniques to project activities to meet the project requirements (PMI 2008; Turner & Muller, 2005). PM is accomplished through the application of competencies, knowledge areas, and integration of PM processes - where a process is a series of actions bringing about a defined result (PMI, 2008). Both the leading project management structured methods, PMBoK and PRINCE2 consider processes vital to the project’s success. PMBoK incorporates the five process groups of initiating, planning, executing, monitoring, controlling, and closing of projects. These process groups encompass thirty seven other processes (PMI, 2008). Each process involves detailing the inputs, outputs, tools and techniques to meet the objective of the process. PRINCE2 is a process based methodology to be applied to projects, and essentially gives guidance in the execution and monitoring of a project. The processes of Prince2 define the management activities to be undertaken during the project. PRINCE2 describes eight high-level management processes which are used for managing the project from end to end, covering the activities from initiating a project, through controlling and managing progress, through to project completion and closure. These

eight processes are: Starting Up a Project, Initiating a Project, Planning, Directing a Project, Managing a Stage Boundary, Controlling a Stage, Managing Project Delivery and Closing a Project.

4.0. Project Management Processes for Change Management

The literature highlights a scarcity of guidelines or frameworks for CM (Todnem, 2005). However, Todnem (ibid) details three models which offer practical guidance to organisations in terms of processes, tools and techniques for change implementation. It is suggested there are some possibilities to improve CM practices as well as links with PM processes to build a process for CM that is more comprehensive to the reality of continuing business change. In order to demonstrate this, the CM process models proposed by Kotter (1996), Kanter *et al.* (1992) and Luecke (2003) have been reproduced in Table 1, with a fourth column detailing possible contributions from PM which could add value to the CM process.

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Table I – PM Methodologies and CM Models

4.1. Meeting Objectives

Todnem (2005), in his critical review of organisational CM, argues that there is a fundamental lack of a valid framework for organisational CM. Whilst leading CM theorists Kanter (ibid), Kotter (ibid), and Loecke (ibid) highlight the importance of creating a vision and strategic intent for implementing change, Todnem (2005) argues that the literature lacks sufficient methodology for measuring the success of organisational CM. PM processes could be utilized in this instance should the CM be treated as a project. Both the PRINCE2 and

PMBoK resources have a process to capture the results of the project and confirm the desired outcome. The PRINCE2 process “Closing a Project” ensures that all planned outcomes have been delivered to the customer’s required parameters, as specified in the project brief and business case contained within the ‘Starting up a Project’ process. In addition to the “Closing a Project Stage,” an “End Project Report” is prepared to detail the outcome of the project. PMBoK also has a specific process for measuring the success of a project which could be implemented in the CM field. The PMBoK “Closing Process” provides a formal process for measuring success by evaluating the project against clearly defined goals. The process also ensures acceptance by customers and stakeholders of the project (PMI, 2008). With the high failure rate of change projects appearing to fail (Hughes, 2011), this closing process could be incorporated into the CM project to review what has been delivered against what the objective of the project was.

4.2. Capture Lessons Learned

Another important process that both PRINCE2 and PMBoK utilize is the capturing and documenting of lessons learned over the duration of the project, including both positive and negative experiences. PRINCE2 has a mechanism in the form of a ‘Lessons Log’ to capture knowledge gained throughout the project (Pincemaille, 2008). Lessons are logged and then a lessons report is compiled at the end of each stage to document and build a knowledge bank of lessons. PMBoK also values the importance of lessons learned; with processes adopted for identification, documentation, validation, and dissemination of lessons learned (PMI, 2008). Also forming part of the lesson learned process is identification of actions taken as a result of the lesson learned and subsequent follow-up to ensure the required action had been taken. Whilst performance of any current project cannot be changed at the conclusion, the performance of future projects can be improved by documenting lessons learned for future

review. Significantly, leading CM process models fail to appropriately consider lessons learned from previous CM processes. In the rapidly changing business environment this would appear to be a shortfall of CM. Capturing lessons learned, both positive and negative, would assist in planning future change-projects and be a useful process to incorporate into the CM framework.

4.3. Delegate Responsibility

Projects are often used to implement a strategy. The implementation of a strategy involves a change process and this change process invokes uncertainty. Whilst the leading theorists on change articulate communicating the change vision to all affected, Verwey and Comminos (2002) recommend implementing a process called “Business Focused Project Management” (BFPM) to deal with uncertainty and constant change through ‘progressive elaboration’ of a project. In BFPM, each functional group in an organisation interprets a strategy and develops a business plan independently, from which a portfolio of projects are reviewed and subsequently resourced. This process is proposed to effectively manage the change associated with business projects containing intangible characteristics; and empowers individual functional units to be involved and be integral to the change. Such projects include business process improvements, customer service improvements, or organisational restructure (Verwey and Comminos, 2002), where there is a need to address changes in the organisational culture and stakeholder perceptions. This process of empowering individual functional units to embark on change by clearly delegating responsibilities for project activities is a PM resource utilized in PRINCE2 which could be applied in CM. PRINCE2 utilizes work packages which are performed by individuals or teams in the accomplishment of stage objectives; and then accepted by the project manager once accomplished (OGC, 2005). This process of delegation and subsequent acceptance of work packages could be utilized in the

CM arena to delegate tasks and responsibilities to individuals or business units. This would improve the leading CM models which do not adequately address this concept of delegation of project activities and responsibilities.

4.4. Staged Approach

There is a well-known phrase, “if you fail to plan, then plan to fail”. This phrase captures the importance of having a clear framework to coordinate the resources required for implementing the project, including the activities of the people involved or affected by the change, stakeholders, the finances, and competencies applied in the project. PRINCE2 utilizes a process to effectively manage execution of the initial plan of the project which the majority of the CM literature fails to discuss.

Whilst a project plan is prepared in the initial planning, which sets out how and when the project will be delivered, the project is divided into a number of clearly defined and controllable stages which PRINCE2 refers to as the process of “Manage by Stages” (OCG, 2005). Utilizing this PM process, detailed planning of succeeding stages is only undertaken upon nearing completion of the current stage. Once a stage is approaching completion, the work for the succeeding stage is planned in detail by the Project Manager and then subsequently approved by the authority for the project (Project Board in PRINCE2 terminology).

PRINCE2 also utilises the “Managing a Stage Boundary” which is a decision point in the continuity of the project. This process provides a decision point on whether the project will be continued as planned, adjusted or stopped. The process involves reviewing the current stage and determining whether the business case is still valid, and if the project can proceed to the next stage. The process is managed by the Project Manager, who informs the Project Board of the likelihood of success in attaining the project business objectives, project plan,

together with associated risks and issues. If the Project Board is satisfied with the current stage-end and the next stage plan, the project is permitted to continue. Therefore the 'Managing a Stage Boundaries' is a vital process in the management of the project.

This process is well suited to CM implementation. This process of separating the project into stages and managing stage boundaries, is ideally suited to change-projects where there is a likelihood of alteration to the initial plan upon implementation. Furthermore, it facilitates ongoing review and justification for the change initiative.

The literature largely fails to consider the likelihood of changes to the plan. Resistance to change is one scenario where the initial plan of the change-project needs to be altered although there is an array of possibilities for deviation from the initial plan. Kanter (1992), emphasises the need for "crafting an implementation plan", although within his "Ten Commandments for Executing Change" he fails to identify the need to monitor and adjust the strategy in response to problems in the change process. Kotter (2003) discusses developing a vision and strategy which identifies the desired outcome, however this does not lay out the steps to achieving the objective. Utilising a stage approach and planning the detail of each stage once progress of the current stage is accomplished would strengthen the CM process by appropriately dealing with amendments. Kotter & Rathgeber (2006) argue that one clear lesson learned from successful change initiatives is that change goes through a series of phases. Therefore, phases are ideally suited to a staged approach. This is reinforced by "7 Steps to Change Management" (Luecke, 2003), which identifies the need to "monitor and adjust strategies" in response to problems in the CM process. It appears that PM could provide tools for what is already identified by CM theorists as a need to successfully implement change initiatives.

4.5. Risk Management

Risk management, an important consideration of PM, could enhance CM initiatives. Within PRINCE2, risk can be defined as *uncertainty of outcome* (Pincemaille, 2008). The goal of risk management is to manage the exposure and militate against risks. The project leadership or 'Project Board' in PRINCE2 has to promote risk management, build up adapted policies, and assess projects status related to their risks. In the PRINCE2 processes, risk management is addressed from the conceptual development of a project. Commencing with the 'Initiating a project' process, there is a prevailing insistence on the importance to assess risks. Then, in the project process 'Planning', risk management is utilized again. For each stage of the project, risk analysis has to be undertaken, to determine whether or not the new plan is compliant with project constraints, and identified risks; without changing the criticality, the priority, importance, or the action plan taken to avoid the risk (Pincemaille, 2008). PMBoK considers risk management integral to the project life cycle, with the six clearly defined processes of: risk management planning, risk identification, qualitative risk analysis, quantitative risk analysis, risk response planning, risk monitoring and control (PMI, 2008). This consideration in PMBoK and PRINCE2 to identify and plan for risks is ideally suited to the CM process where any number of risks could be encountered over the change process.

5.0. The Importance of Change Management to Project Management

Whilst it has been argued that many of the PM processes and techniques are well suited to CM, the PM field has traditionally placed a strong emphasis on the management of tasks. The PM methodologies largely avoid many of the softer issues related to projects: such as the human, political and organisational change implications. Some of these issues which the PM professional has traditionally unheeded could be translated into, but not limited to, company politics and power struggles, stakeholder management, hidden agendas, cultural barriers, motivation issues, lack of communication, conflict resolution, resistance to change,

ambiguous roles and responsibilities, poor project leadership, insufficient sponsorship (Turner and Muller, 2005; Toor and Ogunlana, 2009; Levasseur, 2001). This arguable deficiency of the traditional PM professionals could be because of their technical backgrounds, where focus has been enshrined in tactics and results; or even a gender issue (Paton & Demster, 2002).

In contrast, CM professionals are traditionally from social sciences and humanities backgrounds and have a tendency to avoid the task and process orientated approach by placing a much stricter emphasis on the human, political and organisational change considerations (Kotter & Schlesinger, 2008). The CM professional has traditionally lacked the technical know-how, and has a restricted focus on project objectives - whilst pursuing softer objectives around those people affected by the change. It is a common theme throughout the CM literature to adequately build an individual's awareness and desire for change. However, implementing and coordinating the logistics of a complex change project requires PM skills to plan and execute the change initiative (Kotter & Cohen, 2002). Therefore, whilst PM processes and techniques are ideally suited to CM, its techniques are also valuable to effective PM. Therefore, it is considered that the two fields should not be viewed as mutually exclusive. The goals and objectives of CM which are largely focused on organisational support and adoption are also aligned with those of PM, since the objective of any project requires the willingness of the organisation to implement; and both are aligned with the organisational strategy.

A common practice of large organisations undergoing CM is to utilise the human resources (HR) department for implementation; often with the assistance of third-party advisors. This is because of the ongoing presumption that CM is about people and the associated soft skills; and as such CM should be in the HR area of an organisation. Whilst it has been argued above for the application of PM processes to improve CM outcomes, further research is

recommended into determining whether greater involvement from HR to a project/program management area of the organisation could deliver better outcomes.

6.0. Conclusion

The rapidly changing business environment has required organisations to seek out effective processes, tools and techniques to implement successful change. Whilst there is a significant body of literature surrounding CM, the high failure rate of change interventions suggests improvements could be made to its management, monitoring and control. The analytical focus of this research was in how the common and most utilised CM models could be improved with PM processes in order to appropriately deliver successful change. Using PMBoK and PRINCE2 as a reference, a number of PM processes and techniques have been detailed which demonstrate the applicability of project-based processes for implementation of CM initiatives.

The lack of a suitable guiding framework for CM suggests the creation of a CM body of knowledge and alignment of CM processes could enhance the field. Although CM encompasses a broad range of possible change models, the attempts by CM theorists to apply a formal structure to the change process have been scant. Treating change initiatives as a temporary project and subsequently integrating CM with PM processes will capture synergies between the two areas. The social science background of CM professionals and the tendency for HR to deliver change initiatives has contributed to the lack of appreciation for formal processes and technical contributions as offered by PM in delivering change. Likewise, theorists developing CM from non-technical backgrounds tend to focus on the human dimensions over all other issues. Further research into specific integrated techniques and tools for delivering change would be valuable with particular focus on technical contributions to CM. Moreover, the PM field could gain from utilizing CM processes in implementation of

projects. It was purported 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 CM, which are equally valuable to project success. Bridging these two gaps could increase the success of CM initiatives and similarly enhance the success of projects-based interventions.

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Table I – PM Methodologies and CM Models

10 Commandments for Executing Change Kanter <i>et al.</i> (1992)	8 Stage Process for Successful Organisational Transformation - Kotter (1996)	7 Steps - Luecke (2003)	PMBOK Translation of Steps into Project Methodology and Techniques
1. Analyse the organisation and its need for change		1. Mobilise energy and commitment through joint identification of business problems and their solutions	
2. Create a vision and a common direction	3. Developing a vision and strategy	2. Develop a shared vision of how to organise and manage for competitiveness	Develop a vision and corresponding high level plan; define stages for project implementation
3. Separate from the past			Identify and develop plan for risks
4. Create a sense of urgency	1. Establishing a sense of urgency		
5. Support a strong leader role		3. Identify the leadership	
6. Line up political sponsorship	2. Creating a guiding coalition		
7. Craft an implementation plan			Implement plan utilising a stage by stage approach
8. Develop enabling structures	5. Empowering broad-based action		Define work packages and delegate responsibilities
9. Communicate, involve people and be honest	4. Communicating the change vision		
10. Reinforce and institutionalise change	8. Anchoring new approaches in the culture	6. Institutionalise success through formal policies, systems and structures	Manage by stages - Review and adjust plan where required at end of each stage
	6. Generating short-term wins		
	7. Consolidating gains and producing more change		
		4. Focus on results, not on activities	
		5. Start change at the periphery, then let it spread to other units without pushing it from the top	Measure success of project
		7. Monitor and adjust strategies in response to problems in the change process	Capture and document lessons learned for future projects
Taken from Todnem (2005: 376) and adapted to link to PM methodologies			