


Training for European Logistics Certification – ELA Managerial level (ESLog)

MODULE D : CHANGE AND PROJECT MANAGEMENT

Presentation prepared by : **Kostas Theofanides**

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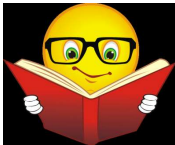
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CHANGE AND PROJECT MANAGEMENT

INTRODUCTION

(Refer to the EIL slides)




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6.2.04.01 *Defines and manages the scope of a project*



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6.2.04.01 Defines and manages the scope of a project

A. Scope Definition

A1. Goals and Deliverables

Goals - Objectives

It's the direction that we want to go, for example. The tourism development of Epirus.
Answers, "why" we do the Project


Deliverables

They are the tangible deliverables expected at the end of each phase of implementation of a project, e.g.: Studies, Designs, Manuals, etc.

Scope

It is the physical object that we expect to implement, e.g. : 8floors, Hotel 5 stars, 200 rooms, with 3 bars, 2 restaurants, swimming pool, roof garden and surrounding area of 3000 m.

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6.2.04.01 Defines and manages the scope of a project

A. Scope Definition

A2. Actions

These are the actions that need to be taken to complete the project.

Tasks

Actions are broken down into Tasks

Example :
One of the Actions for organizing a Logistics Network is the construction of Warehouses. This Action is analysed :

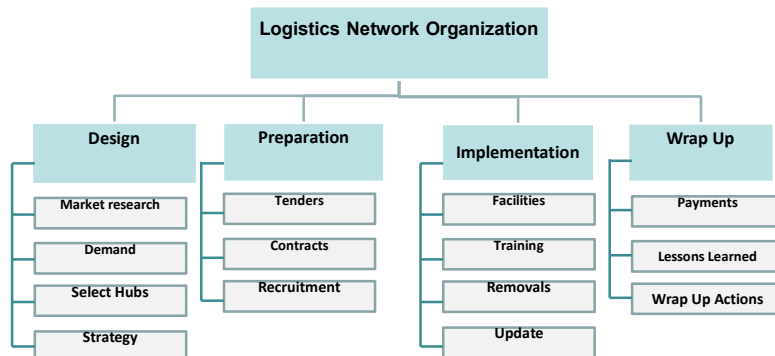
- *Business Plan*
- *Financing*
- *Purchase of land*
- *Designs - Licenses*
- *Building*
- *Electromechanical - Equipment*
- *Test mode*

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6.2.04.01 Defines and manages the scope of a project

A. Scope Definition

A3. Break down in tasks (work breakdown structure) – Example :



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6.2.04.01 Defines and manages the scope of a project

A. Scope Definition

A3. Break down in tasks (work breakdown structure)

Work Breakdown Structure (WBS)

Dividing complex projects to simpler and manageable **tasks** is the process identified as Work Breakdown Structure (WBS).

Usually, the project managers use this method for simplifying the project execution. In WBS, much larger tasks are broken down to manageable chunks of work. These chunks can be easily supervised and estimated.

Following are a few **reasons for creating a WBS** in a project:

- Accurate and readable project organization
- Accurate assignment of responsibilities to the project team
- Helps to estimate the cost, time and risk
- Illustrate the project scope, so the stakeholders can have a better understanding.

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6.2.04.01 Defines and manages the scope of a project

A. Scope Definition

A3. Break down in tasks (work breakdown structure)

Product Breakdown Structure (PBS)

Dividing complex projects to simpler and manageable **deliverables** is the process identified as Product Breakdown Structure (PBS).

Usually, the project managers use this method for simplifying the project understanding. In PBS, the project is broken down to manageable parts or deliverables. These parts can be easily understood and managed.

Following are a few **reasons for creating a PBS** in a project:

- Reflect the project to the project organization
- Easy understanding of project scope and deliverables
- Accurate assignment of responsibilities to the project team
- Illustrate the project scope, so the stakeholders can have a better understanding.

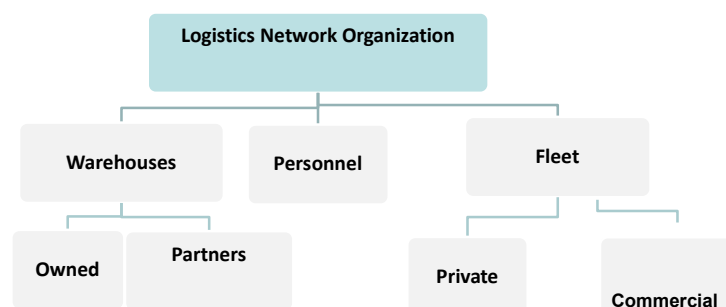
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A. Scope Definition

A3. Break down in tasks (work breakdown structure)

Product Breakdown Structure (PBS) - Example :

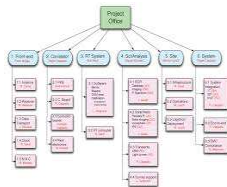


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6.2.04.01 Defines and manages the scope of a project

A. Scope Definition

A3. Break down in tasks (work breakdown structure)



a. Analysis in Actions/Tasks/Activities can be done at as many levels as we want. For over 1-2 levels it is difficult to manage and various software (MS project, Primavera, etc.) are offered.

b. The degree of analysis that everyone involved in Project deepens is equivalent to their position in the organization's hierarchy.

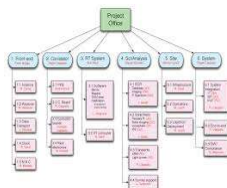
- Project owner deepens to 1-2nd level,
- Project Mgr at the 1-2-3rd level throughout the projects Actions
- Project team Members at the 2-3-4 level of the actions that are responsible for implementing

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6.2.04.01 Defines and manages the scope of a project

A. Scope Definition


A3. Break down in tasks (work breakdown structure)



c. Each Action/Task is assigned various information related to it. The information that are handled by the software to monitoring the project is :

- *Start/Finish Dates*
- *Workload*
- *Specialties - Equipment*
- *Responsible for Action/Work*
- *Estimated cost*
- *Design Code/Specification*
- *Suppliers*
- *Etc.*

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6.2.04.01 Defines and manages the scope of a project

A. Scope Definition

A4. Define resources

For each Action we determine the resources we will need.


Resources are considered :

- Employees by specialty
- Vehicles/Machines/equipment
- Funds
- Time

Optimal management of Resources is necessary because :

- They are often limited
- When they are secured on time they are cheaper
- When we employ fewer resources for longer they are more economical than if we use more for shorter periods.
- Frequent resource reuses have setup cost

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6.2.04.01 Defines and manages the scope of a project

A. Scope Definition

A5. Define responsibilities

RACI chart

Delegation of authorizations and responsibilities is an important part of the role of project mgr. Thus, it is very important to define roles and responsibilities at the start of the project. The RACI model is very useful for this task because it clarifies the expectations that Project Mgr has from project team members.

Projects involve many people and with **RACI we achieve:**

- No **duplication**, i.e. two executives dealing with the same issue
- There should be no **gap**, i.e. no matter how much no one is involved, believing that someone else is responsible.
- Team members know what **issues are responsible**, and when to involve project mgr or other members, and when to handle them at their own discretion.
- Team members know what **other members expect from them**.

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6.2.04.01 Defines and manages the scope of a project

A. Scope Definition

A5. Define responsibilities

Project : Διαγωνισμός Εξεύρεσης 3PL

Ολοκληρώθηκε

Σε εξέλιξη

Ακυρώθηκε

Κινδυνεύει - Καθυστερεί

R = Responsible : Υπευθυνος για την εκτέλεση της εργασίας

A = Accountable : Υπολογος να διασφαλίσει την ολοκλήρωση της εργασίας

C = Consulted : Πρέπει να ζητηθεί η γνώμη του

I = Informed : Πρέπει να ενημερωθεί πριν/κατά/μετά

No	ISSUE	ACTION	SC Director	Transport mgr	Warehouse Mgr	Procurement Mgr	Buyer	Lawyer	Date assigned	Date target	Status	COMMENTS
1		Συνταξη Τεχνικής Περιγραφής/ Συγγραφής		R	R	A	R	R/C				
2		Ερευνα Αγοράς - Προεπιλογή		R	R		A/R					
3		Προσκλησεις (RFI-RFP)				A	R					
4		Προσκλησεις (RFQ)				A	R					
5		Παροχη διευκρινισων		C/R	C/R	A	R	C				
6		Αξιολογηση προσφορων		C/R	C/R	A	R					
7		Διαπραγματευσεις (PTN)		C/R		A/R	R	C/I				
8		Συμβαση				A	R	C				
9		Transition		A	R	R	C					

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6.2.04.01 Defines and manages the scope of a project

A. Scope Definition

A5. Define responsibilities

The acronym RACI means :

Responsible : He's the one who does the job or makes the decisions. It could be one and more.

Accountable : He's the one who's responsible for the job being done properly and on time. He's accountable to his company or the law. It is necessarily an individual, because responsibility cannot be shared. "Many responsible =no one responsible". Usually accountable is the "Master" of the Project.

Consulted : It is the people who are consulted by the members of the project team. They're people with experience, experts, scientists. Two-way Communication.

Informed : They are the people who need to inform the team member of the progress of the project because they are affected by the result of the activity they are conducting.
One Way Communication.

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6.2.04.01 Defines and manages the scope of a project

A. Scope Definition

A6. Define scope boundaries

We must define and agree Suppliers-Customers what is included and what is not included within the Project Object

The Scope "Creep" phenomenon often occurs

The causes of Scope creep :

- customers don't always know exactly what they want
- customers write what they want in summary with bullets
- suppliers do not always have time to draw up in detail the Object and specifications
- suppliers and customers make different assumptions even on the same issues
- customers would rather see something to decide what they want it than plan how they want it

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6.2.04.01 Defines and manages the scope of a project

A. Scope Definition

A6. Define scope boundaries

The consequences of Scope creep :

- Suppliers are addicted to giving higher fixed fee financial offers to deal with potential additional claims
- Vendors give low prices to get a project leaving out tasks for which the customer will be forced to accept an additional charge because they will have no other solution (e.g. 400 Euro for transport, but we leave it unspecified if it includes unloading)
- Profit margin eliminates
- Disrupting relations between suppliers and customers

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6.2.04.01 Defines and manages the scope of a project

A. Scope Definition

A7. Define constraints and assumptions

Constraints :

- They are limits within the Project should move.
- According to the PMBOK it is: Scope, Schedule, Budget, Quality, Resource, Risk
- They exist in every project
- Defined at the beginning of the project
- Project Mgr must know and understand them
- Affect Risk Management
- It's Business (Time, Budget, Resources) and Technical (Specifications)

Examples of Constraints :

- *The budget is 400000 E*
- *There's only one special cargo crane.*
- *Test pressure must not exceed 6 atmospheres*

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6.2.04.01 Defines and manages the scope of a project

A. Scope Definition

A7. Define constraints and assumptions

Assumptions :


It's a belief in facts and circumstances that we expect to come true.

- They exist in every project
- Depend on available information, knowledge, experience
- Project Mgr must know and understand them
- Affect Risk Management

Examples of Assumptions :

- *There will be contractors during the holiday season*
- *Machinery costs will be stable in the future*
- *Interested parties will be supportive of the project*

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6.2.04.01 Defines and manages the scope of a project

A. Scope Definition


A8. Get sign off

The project object, once determined in detail, must be recorded and signed by Project Mgr and other project stakeholders such as Project Owner, Project Team members.

Project Scope Statement usually includes :

- Executive Summary
- Business Value
- Product Scope
- Project Scope
- Other Relevant Scope Information
- Out of Scope
- Acceptance Criteria
- Project Scope Statement Approval/Signatures

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6.2.04.01 Defines and manages the scope of a project

B. Scope Management


B1. Scope change management system

Objective of the Change Management Process

It is a mechanism used to record, examine, approve, implement changes in the Project, specifically :

- Manage requests for changes from the moment they are submitted until they close
- Organize the implementation of changes
- Inform stakeholders of the impact of the changes
- Make it easier for small changes to be implemented without financial burdens

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6.2.04.01 Defines and manages the scope of a project

B. Scope Management


B2. Document scope change request

The request to change the object must be documented in a special form which may include :

- Description of the requested change
- Justification
- Priority
- Evaluation (Scope, Schedule, Cost, Quality, Risk, etc.)
- Implementation Alternatives
- Decision/signatures

(see attachment)

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6.2.04.01 Defines and manages the scope of a project

B. Scope Management

B3. Define impact of scope change on timeline and resourcing

Object Changes Have An Impact on Project Schedule and Resources. Delays and additional resources must be costed and brought to the attention of Project Owner if it agrees with the changes and their impact.

In order to be approved changes, the Project Owner in collaboration with the Project Mgr must resolve the following queries :

- **Budget** is available?
- **Time** available?
- **Resources** available?
- Are the **Risks** controlled??

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6.2.04.01 Defines and manages the scope of a project

B. Scope Management

B4. Approval system

A special procedure should be provided for the approval of any change to the Object and only specific staff members should be authorized for the approval. Typically, the approver of a change of Object is the same one that approved the original Object. However, it may authorize others to be responsible for such approvals in proportion to the level of impact.

B5. Update project scope

Any change to the Object must be incorporated into the Project Scope in order to be a Single Document and used by all of them at the same version.

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6.2.04.02 Establishes project Governance Structure

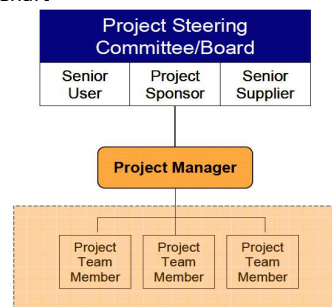


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6.2.04.02 Establishes project Governance Structure

Project Governance is the administrative framework in which decisions are taken. The administrative framework of a project is different from the Organization Chart of a "Permanent Organizational Structure". Namely, the Logistics Management Organization Chart may be different from the Outsourcing Warehouses Project Organization Chart

Standard structure governance →



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6.2.04.02 Establishes project Governance Structure

A complete Governance model provides :

- Clear roles, responsibilities and accountabilities
- Clear reporting
- Clear information flows
- Clarity of stakeholders
- Clear scope
- Clear financial authorities
- Ethics
- Dispute and conflict resolution & escalation channels
- Obvious delivery model overlays
- Apparent meeting schedules

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6.2.04.02 Establishes project Governance Structure

A. Alignment with all stakeholders

The successful implementation of a project must ensure the alignment of stakeholders. This includes the following good practices::

1. Understand the needs of stakeholders/decision makers
2. To act so that these needs become to the greatest extent common (aligned) and not opposed to
3. To determine the needs we can use customer surveys, gap analysis, 360 surveys, benchmarking, etc.
4. Don't assume you know the needs of customers
5. You get written confirmations, reviews and approvals

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6.2.04.02 Establishes project Governance Structure

B. Appropriate delegation

Project roles and objectives

The project Owner :

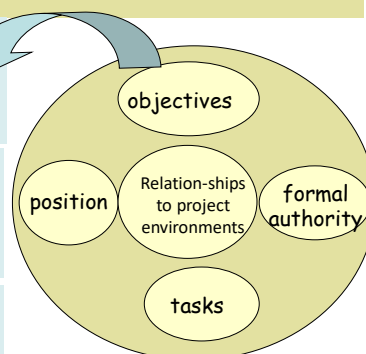
- realize company interests
- coordinate project-interests
- assign the project
- lead the PM/ support the project team

The Project Mgr :

- realize project interests/objectives
- lead project team and contributors
- represent the project externally
- develop/adapt pm documentation

The project team member :

- realize project interests/objectives
- represent the project internally
- fulfill work packages / fulfill pm task



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6.2.04.02 Establishes project Governance Structure

B. Appropriate delegation

The general principle applies : Each position, depending on the role and objectives it has undertaken to achieve, **must also have the appropriate authorisations**, i.e. the possibility of decision-making and the commitment of the company, so that it can proceed with the actions that we expect the position holder to take..

Each level of the Project hierarchy can assign to the following levels part of the feature that has been.

Παραδείγματα :

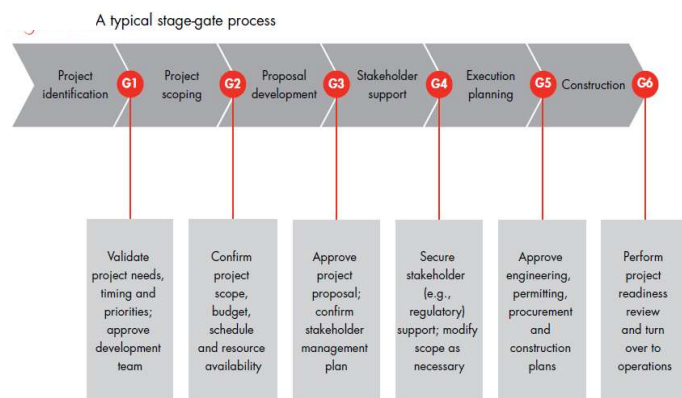
A. Project Mgr is the one that informs the steering committee about the progress of the project. Especially for finances, it assigns the cost controller to make the information.

B. Project Mgr is authorized for purchase orders up to 20000 E. Authorizes project materials storekeeper to be able to make purchases up to 1000 E

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6.2.04.02 Establishes project Governance Structure

C. Decision gates



Source: Bain & Company

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6.2.04.02 Establishes project Governance Structure

C. Decision gates

The Decision Gates methodology is used throughout a project, from the initial phase of concept to its implementation. The **OBJECTIVE** is at each stage to be evaluated by someone (e.g. PM) or a committee (e.g. Steering Committee) which, depending on the evaluation of Risks, Resources, Time, Profit, etc., decides whether to move on to the next phase or stop the implementation there. It may also request clarification or additional requirements before deciding to take the transition to the next stage

Usually included **5 Phases** :

- Scoping
- Build business case
- Development
- Testing and validation
- Launch

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6.2.04.02 Establishes project Governance Structure

C. Decision gates

The evaluation shall include the following POINTS :

- **Quality of execution :**

We're checking to see if the previous phase was performed in a qualitative manner..

- **Business rationale**

We check whether the project continues to be attractive financially and businessly

- **Action Plan**

We check whether the proposed action plan and the resources requested are reasonable and adequate

Gate meeting can lead to the following DECISIONS :

- GO
- KILL
- HOLD
- RECYCLE
- CONDITIONAL GO

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6.2.04.02 Establishes project Governance Structure

C. Decision gates

THE CONTENT OF THE GATES

The structure of the gates consists of the following elements :

- **Deliverables)** : From the beginning of the project, the deliverables that the project team must bring to each gate meeting are determined.
- **Criteria** : Questions or indicators with which the project is evaluated in order to decide the next move ((go/kill/hold/recycle)
- **Outputs** : Are the results of the gate review assessment that include :
 - one of the decisions : go/kill/hold/recycle,
 - approved action plan for the next gate
 - list of deliverables for next gate
 - next gate date

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6.2.04.02 Establishes project Governance Structure

C. Decision gates

Advantages

1. **Evaluation of the various projects** : A gate review process helps cut projects with problems, immature, with low profit, because an Organization's resources are limited and should be allocated to those projects that bring the best results
2. **Reduce complexity**
3. **Confirm the business case**

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6.2.04.02 Establishes project Governance Structure

C. Decision gates

Exercise:

Your company is thinking of organizing in-house fleet.

A. Organize the phases and corresponding GATES.

B. What elements (Deliverables, Criteria, Outputs) would you like to examine in the gate before the execution of the project and specifically before signing a truck supply contract?

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6.2.04.02 Establishes project Governance Structure

D. Consistent and transparent reporting

The Progress Report is issued by the Project Mgr and refers to the Budget, the TimePlan, the Object.

Distributed to Project Sponsor, Budget Holder, Senior Users, Team Member.


The report must be simple and contain only the essentials of interest to those to whom it is sent

A report may include :

- Report Date
- Overall Status
- Project Summary
- Key Issues
- Identified Risks
- Tasks and Next Steps
- Decisions Needed
- Key Future Dates
- Budgeted Cost
- Spend to Date



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6.2.04.02 Establishes project Governance Structure

D. Consistent and transparent reporting

Project Closure Report


Project Closure and Post Implementation Report (PCPIR) is presented to Management at the end of the project and provides a final evaluation of the project. In particular, it presents the level of success of the project and whether and in what ways the project has achieved the expected benefits.

The Report includes details recorded during a post implementation review meeting that is organized after the project is completed

The main topics that a PCPIR should include are: :

- An end project report, covering :
 - The achievement of the objectives of the project,
 - Results against objectives and deviations
 - Impact of any changes on the project and on the business case
- The procedures to be applied in the post-project review
- The Actions to Track Closing Tasks
- Lessons learned.

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6.2.04.02 Establishes project Governance Structure

E. Independent review

The control over the progress and results of major projects is entrusted to experts who are not related to the project team.


Usually it is:

- Experienced executives,
- Specialized audit companies
- Teams of executives recommended by The Project's Owner

In order to ensure objective control :

- The owner of the project must have a direct relationship with the Audit Office and be responsible for its payment (In some projects for tax or contractual reasons the availability of budget, the Owner instructs Project Mgr to appoint an auditor and cover his fee from the budget of the project. This leads to dependency.
- The Auditor must not have relationships related or professional to the organization of Project mgmt.


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CHANGE AND PROJECT MANAGEMENT

6.2.04.03 Understands the concept of project management life cycle



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6.2.04.03 Understands the concept of project management life cycle

Project Management Processes

Project Management includes processes with specific administrative actions to be taken in each process :

- **Start**
- **Planning**
- **Execution**
- **Coordination-Control**
- **Closing**

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6.2.04.03 Understands the concept of project management life cycle

Project Management Processes

The main project management processes that operate during the Project Phases are :

- **Phase management**
- **Planning**
- **Control**
- **Team management**
- **Communication**
- **Procurement**
- **Integration**

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6.2.04.03 Understands the concept of project management life cycle

Project Management Processes

These are distinct periods of time during which certain actions are performed. Usually the results of one phase are used in the next phase

- **Project strategy and business case**
- **Preparation**
- **Design**
- **Development and testing**
- **Training and business readiness**
- **Support and benefits realization**
- **Project close**

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6.2.04.03 Understands the concept of project management life cycle

The 47 PMBoK Project Management Processes

The 47 PMBoK® PROJECT MANAGEMENT PROCESSES		Knowledge Areas										
		Integration	Scope	Time	Cost	Quality	Human Resources	Communication	Risk	Procurement	Stakeholder	
Initiation	Initiating	1									1	2
Planning	Planning	1	4	6	3	1	1	1	5	1	1	24
Execution	Executing	1				1	3	1		1	1	8
	Mon & Contr.	2	2	1	1	1	1	1	1	1	1	11
Close-out	Closing	1								1		2
		6	6	7	4	3	4	3	6	4	4	47

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6.2.04.03 Understands the concept of project management life cycle

A.Initiation

A1. Business case development

Business Case is a written argument under which the Decision maker will be persuaded to approve an investment or a change. Includes, inter alia, :

- The executive summary
- The problem statement
- Analysis of the situation
- Solution options
- Project description
- Cost-benefit analysis
- Recommendations

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6.2.04.03 Understands the concept of project management life cycle

A.Initiation

A2. Feasibility

- The Feasibility Study analyses requirements and cost/benefits before the commencement of a project to implement change.
- Either refines a Business Case by examining the range of possible options, or forms a basis for its development
- The Feasibility Study should address issues that influence the success of the project
- The **purpose** of a Feasibility Study is to provide a good foundation to allow early project analysis and design activities to commence in a focused manner

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6.2.04.03 Understands the concept of project management life cycle

A.Initiation

A2. Feasibility

- The **steps** to conduct a feasibility study are :
 1. Appoint an experienced feasibility study team
 2. Define the scope of the Study and any constraints (time, cost, quality, etc)
 3. Appoint external advisors if necessary
 4. Create a plan for the study (milestones, responsibilities, etc)
 5. Set a time table and a budget
 6. Write the Feasibility Report

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6.2.04.03 Understands the concept of project management life cycle

A.Initiation

A3. Project scope/charter

The most important result of the "Project Start" phase is the creation of the Project Statute which officially activates to start work on the implementation of the project and gives Project Mgr the authority to do its job. This authorization is issued by someone outside the Project Team who belongs to a higher organization.

Attention :

- A project cannot start unless there is a Project Statute
- Other terms used for the Project Statute are :
 - a. *project initiation form*
 - b. *project authorization*
- A signed contract may act as a Project Statute

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6.2.04.03 Understands the concept of project management life cycle

A.Initiation

A4. Project team installation

The Project Team includes :

- Project mgr.
- Project team members
- partners and experts, internal or external

Project Mgr is selected according to criteria :

- similar experience in similar projects
- proven ability to command projects and teams
- possession of certification PM (PMI, IPMA, PRINCE 2)

Project team members are selected according to criteria :

- Specialized experience (e.g. costing, design, controller, etc.)
- Additional experiences and knowledge

~~Κατάλληλες προσωπικότητες με team spirit~~

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6.2.04.03 Understands the concept of project management life cycle

A.Initiation

A4. Project team installation

Roles in Project Management:

The “Master” of the project:	<ul style="list-style-type: none"> - realizes company's interests - coordinates project's interests - assigns the project - leads the PM, supports project team
Project Manager:	<ul style="list-style-type: none"> - realizes project interests/objectives - leads project team and contributors - represents the project externally - develops/adapts pm documentation
Project Team members:	<ul style="list-style-type: none"> - realize project interests/objectives - represent the project internally - fulfill work packages - fulfill PM task

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6.2.04.03 Understands the concept of project management life cycle

A.Initiation

A4. Project team installation

Project Mgr is usually selected by :

- The “Master” of the project
- the Organization that undertakes Project mgmt.

Project team members are usually selected by :

- The “Master” of the project
- the Organization that undertakes Project mgmt.
- Project Mgr
- directors of the 'permanent organisational structures' where these members work

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6.2.04.03 Understands the concept of project management life cycle

B. Planning

B1. Project

The first thing that needs to be clarified so that the Design is realistic and accurate, is "what is the project". I.e :

- What's in the Business case?
- What objectives do the Project Masters, Funders, Users want to serve??
- What is the scope of the project?
- What is the timetable (Time plan) and budget?
- What resources are available?

If these are not specified there is a great risk that we will end up with a failed project or a project that only partially achieved its objectives.

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6.2.04.03 Understands the concept of project management life cycle

B. Planning

B2. Resource

- Resources are people, machinery, energy sources, information, money, etc.
- Resources are finite, cost-effective and why they should be used with caution
- An important aspect of the success of the project is the efficient use of resources.

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6.2.04.03 Understands the concept of project management life cycle

B. Planning

B3. Financial

Financial issues, such as the design of the project, should be taken into account. :

- The **amount** of funding
- **Timing** of funding
- The conditions (**prerequisites**) of funding (terms, milestones, project completion rates for disbursement of funding, etc.)
- The **procedures** for certifying, approvals and disbursement of funding
- **Payments** to project suppliers, amounts, timing, conditions, etc.
- Financing and payments must be compatible and in balance with each other, otherwise the project is at risk of delays, activation of clauses, qualitative degradation, etc.

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6.2.04.03 Understands the concept of project management life cycle

B. Planning

B4. Quality

In the project an important part is the specifications and quality requirements. They are linked to:

- The **cost** of the project because the higher the requirements, the higher the cost of the project, either through the purchase of more expensive materials, is through the collaboration with specialized and high quality workers who have a higher cost of fees, or through the hiring of services such as designers, managers, experts, testing, etc.
- The **time plan**, because usually the application of increased specifications affects the duration of the project
- The **value** of the project, because the higher the quality, the greater its value is derived from the cost either from the revenue the project brings or from its rental value..
- **User satisfaction**

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6.2.04.03 Understands the concept of project management life cycle

B. Planning

B5. Risk

During the implementation of a project, events can be inserted that will have a negative effect on its successful completion.

These events may have an impact on the cost of the project, the time, the quality and at the subject.

The role of the project team is to identify these risks (risk assessment) before the start of the project and to draw up a risk plan to manage them.

Risk management includes :

- the **elimination** of conditions which may produce the risks
- **reducing the possibility** of risk arising
- **reducing the impact** if the risk occurs

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6.2.04.03 Understands the concept of project management life cycle

B. Planning

B5. Risk

Risk Register template

Risk Management Plan

When is it done?

At the completion of a risk management plan, a form known as the Risk Register must be created. Its development takes place during the Planning phase

Why it's necessary

It's a critical factor in the project's success. Risks are recognised in a timely manner, plans are assessed and developed to avoid them or to reduce their impact

How it is captured

Using the Risk Register

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6.2.04.03 Understands the concept of project management life cycle

B. Planning

B5. Risk

Risk Register template **Eg. Risk Register**

Key: H – High; M – Medium; L – Low		Prepared by:						Reference:		
Type of Risk	Description of Risk	Probability			Impact			Risk reduction strategy	Contingency plans	Risk owner
		H	M	L	Perf.	Cost	Time			



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6.2.04.03 Understands the concept of project management life cycle

B. Planning

B5. Risk

Risk Register template - Parameters included


a. Dates :
Because the Register is a live form, it is very important to indicate the dates when the risks have been identified or modified. We can also note the target dates and implementation dates.

b. Risk Description :
A phrase by which we determine the risk

c. Type of Risk :
business, project, stage

- business risks related to the inability to deliver the projected benefits
- project risks related to Project Management, such as Schedule, Resources, etc.
- stage risks related to a specific phase of the project

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6.2.04.03 Understands the concept of project management life cycle

B. Planning

B5. Risk

d. Likelihood of Occurrence:
L-Low (0-30%), M-Medium (31-70%), H-High (>70%).


e. Severity of Effect:
The magnitude of the impact is assessed if the risk occurs

f. Countermeasures:
Measures to be taken to prevent the risk, reduce or transfer the risk. Contingency Plans can also be organized

g. Owner:
It is he who is appointed to ensure that the risks are addressed by the measures that set out .

h. Status:
It shows whether a danger continues to exist or is extinct. Indicators used :
C-current or E-ended.

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6.2.04.03 Understands the concept of project management life cycle


B. Planning

B5. Acceptance

It is the process of receiving and accepting (approving) a project must be predetermined and agreed between the individual parties (project owner, financier, User, Project Mgr).

The subject matter of the checks, the procedure and the rules for delivery – receipt (such as the acceptable maximum failure rate, the speed of operation of the equipment, etc.) must be clear and known on all sides.

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6.2.04.03 Understands the concept of project management life cycle

B. Planning

B6. Communication

What we're looking at in a communication plan :


a. Ακροατήριο

The Project Team must specify all audiences to receive an update.
The update will vary depending on the audience.

b. Ανάγκες ενημέρωσης

Each message must be configured in content and vocabulary depending on the audience to whom it will address

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6.2.04.03 Understands the concept of project management life cycle

B. Planning

B6. Communication

c. Media

The easiest means of communication is email but it is not the most effective for informing the progress of the project or for training purposes. The project team should also consider using newsletters, video or webinars. Presentations and public events are more appropriate for providing information and clarification.

d. Timing

Communication in each project must start in the Planning phase. At first it may be more relaxed but as the project progresses the communication will become more formal. It is very basic to ensure project support from team members, stakeholders and users .

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6.2.04.03 Understands the concept of project management life cycle

B. Planning

B6. Communication

e. Responsibilities

The Project Team is responsible for communication, but can also be assigned to a special management of the Company

Each member is entrusted with the responsibility for informing an audience



- Project Mgr informs Project Owner and the most critical Stakeholders (Interested parties, stakeholders)
- The members of the Project Team inform the internal departments such as Accounting, Procurement, and other stakeholders

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6.2.04.03 Understands the concept of project management life cycle

C. Execution


C1. Build deliverables

Deliverables are the agreed results to be delivered in the interim and at the end of the project:

Deliverables should, for example, take the form of :

1. Study
2. Plans
3. Licenses
4. Seminar material
5. Operating manual
6. Maintenance manual
7. Samples

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6.2.04.03 Understands the concept of project management life cycle

C. Execution


C2. Monitor

The main function and responsibility of the Project Team during its implementation is the coordination of individual tasks and activities so that everything is carried out according to the plan.

When deviations (cost, time, quality and object) are detected from the original design, then decisions and measures are taken to get the project back to the original forecasts.

The operation of monitoring is continuous throughout the project

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6.2.04.03 Understands the concept of project management life cycle

C. Execution


C3. Control

Control is also a basic function of project management. The audit is carried out at regular intervals that vary according to the size of the project, its criticality, the experience and maturity of the project mgr and the members of the project team.

During the Audit meeting, team members report project progress and any deviations in cost, timing, quality, etc.

The objective of the Audit is to identify discrepancies in order to take appropriate measures to remedy them.

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6.2.04.03 Understands the concept of project management life cycle


D. Execution

D1. Project closure

The project closure is the phase that follows the implementation phase (execution, implementation). In fact, this phase starts just before the project is completed and includes activities such as:

- completion of to-dos, settlement of 'wrap up actions', etc.
- payment of suppliers
- final project report
- gathering and recording lessons learned
- organizing pick-up- delivery meetings
- creating operating manual, maintenance manual, drawings as build, final cost
- organizing inaugurations
- Etc.

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6.2.04.03 Understands the concept of project management life cycle

D. Execution

D1. Project closure


Project Closure Report

Project Closure and Post Implementation Report (PCPIR) is presented to Management at the end of the project and provides a final evaluation of the project. In particular, it presents the level of success of the project and whether and in what ways the project has achieved the expected benefits. The Report includes details recorded during a post implementation review meeting that is organized after the project is completed.

The main topics that a PCPIR should include are: :

- An end project report, covering :
 - the achievement of the objectives of the project ,
 - Results against targets and deviations
 - Impact of any changes on the project and on the business case
- An outline of the procedures to be applied to the post-project review
- Follow-up actions for closing tasks
- Lessons learned.

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6.2.04.03 Understands the concept of project management life cycle

D. Execution

D2. Review project


Progress Report

The Progress Report is issued by Project mgr and refers to the Budget, the Time Plan, the Object. Distributed to Project Sponsor, Budget Holder, Senior Users, Team Members


The report must be simple and contain only the essentials of interest to those to whom it is sent

A report may include :

- Report Date
- Overall Status, Project Summary
- Key Issues
- Identified Risks
- Tasks and Next Steps
- Decisions Needed
- Key Future Dates
- Budgeted Cost, Spend to Date




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ESLog - MODULE D :

CHANGE AND PROJECT MANAGEMENT

6.2.04.04 Applies phase gate process to a project



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6.2.04.04 Applies phase gate process to a project

A. Main processes

- A1. Definition
- A2. Initiation
- A3. Planning
- A4. Execution and closure
- A5. Monitoring and controlling all throughout the project

(See paragraph 6.2.04.02.Γ)

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6.2.04.04 Applies phase gate process to a project

B. Each process is broken down into phases with related deliverables

(See paragraph 6.2.04.02.Γ)

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ESLog - MODULE D : CHANGE AND PROJECT MANAGEMENT

6.2.04.05 Coaches projects managers



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6.2.04.05 Coaches projects managers

A. GROW MODEL

The **GROW model** (or process) is a simple method for [goal setting](#) and [problem solving](#). It was developed in the United Kingdom and was used extensively in corporate [coaching](#) in the late 1980s and 1990s.

G	Goal	The Goal is the end point, where the client wants to be. The goal has to be defined in such a way that it is very clear to the client when they have achieved it.
R	Reality	The Current Reality is where the client is now. What are the issues, the challenges, how far are they away from their goal?
O	Obstacles	There will be Obstacles stopping the client getting from where they are now to where they want to go. If there were no Obstacles the client would already have reached their goal.
	Options	Once Obstacles have been identified, the client needs to find ways of dealing with them if they are to make progress. These are the Options.
W	Way Forward	The Options then need to be converted into action steps which will take the client to their goal. These are the Way Forward

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6.2.04.05 Coaches projects managers

A. GROW MODEL

A1. Goal

- a. SMART
(Specific, Measurable, Actionable, Realistic, Time-bound)
- b. PURE
(Positively stated, Understood, Relevant, Ethical)
- c. CLEAR
(Challenging, Legal, Environmentally sound, Appropriate, Recorded).

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6.2.04.05 Coaches projects managers

A. GROW MODEL

A2. Current Reality
A3. Options
A4. Will or Way forward

The GROW model provides for :

1. understanding the **objectives** of the project (TO BE)
2. capturing the **Current Situation** (AS IS)
3. recording the Alternatives in which we will go from AS IS in TO BE and the choice of the best solution
4. the **actions** to be taken to implement the transition from AS IS to TO BE

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6.2.04.05 Coaches projects managers

B. GO MAD MODEL

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Application Levels for Solution Focused Thinking™

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6.2.04.05 Coaches projects managers


B. GO MAD MODEL (Go Make A Difference)

The Go MAD specialise in developing people's ability to **achieve results**. Go MAD offer a unique, research based, solution focused, **thinking system** that equips people with the **mindset and skills** to make significant personal and business improvements.

Typically a business improvement program will involve putting in place interventions to:

- Build senior management commitment and role modelling
- Develop a critical mass of skilled enablers in the form of coaches
- Empower groups (or everyone) to make a difference
- Provide on-going support and sustainability.

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6.2.04.05 Project Methodology


C. FUEL MODEL

- C1. Frame the conversation
- C2. Understand the current state
- C3. Explore the desired state
- C4. Lay out a success plan

Method similar to GROW MODEL.

“Put the context of the debate, understand the current situation, consider what the desired situation is, organize a plan of successful implementation»


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ESLog - MODULE D :

CHANGE AND PROJECT MANAGEMENT

6.2.04.06 Applies a project methodology whilst managing a project



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6.2.04.06 Applies a project methodology whilst managing a project

The project management methodology includes :

- A. METHODS**
- B. PROCESSES**
- C . PRACTICES**

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6.2.04.06 Applies a project methodology whilst managing a project

D. EXAMPLES

The main Project management methodologies are :

- D1. PRINCE** (British origin)
- D2. PMI (PMBok)** (American origin)
- D3. IPMA** (European origin)

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Slog - MODULE D :
CHANGE AND PROJECT MANAGEMENT

6.2.04.07 Manages the costs of project



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6.2.04.07 Manages the costs of project

A. PROJECT COSTS

A1. Resource costs of completing project

These are the costs associated with the implementation of the project. This includes the operating costs of the Project team. The project mgnt cost ranges from 3-5% for large projects mainly construction to higher rates for smaller budget projects

A2. Costs of using, maintaining and supporting the product

These are the costs associated with the operation of the project and include maintenance, support, energy, etc.

The design of the project should not seek the reduced initial cost of implementation of the project but the total **life cycle cost** of the project.

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6.2.04.07 Manages the costs of project

B. PROJECT COST MANAGEMENT

The basic functions of Project Cost Management are :

B1. Estimate Costs

Before approving/assigning a project, the cost of the project must be analysed and budgeted in order to ensure its profitability (ROI) on the other hand its funding.

B2. Determine budget

The next step is to determine the required budget and the sources of funding

B3. Control Costs

During the execution of the project, the main concern of the project team is to ensure that the actual cost does not deviate from the planned cost

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ESLog - MODULE D : CHANGE AND PROJECT MANAGEMENT

6.2.04.08 Understands project quality Management



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6.2.04.08 Understands project quality Management

Project Quality Management includes the following functions :

A. Plan quality

When designing a project a basic function is the design of Quality, which includes the materials, specifications, levels of reliability, etc. of the project.

These **adversely affect** both the construction costs of the project and the time of implementation of the project..

At the same time, they have a **positive impact** on the operation cost and the value of the project.

As these effects concern the Project Owner, various alternative scenarios with their impact should be submitted to the Project Owner and the scenario to be implemented **should be agreed** with him.

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6.2.04.08 Understands project quality Management

B. Perform Quality Assurance

The planned and systematic activities implemented in a quality system so that quality requirements for a product or service will be fulfilled

During the design and implementation of the project, measures and provisions must be taken to ensure the quality of the project. Indicatively these may be the selection of suppliers, the recruitment of certified professionals, procurement procedures, supervision of the project, etc.

Quality Assurance is different operation from the Quality Control

The difference is that :

- QA is *process* oriented and
- QC is *product* oriented.

Quality **Assurance** makes sure you are doing the right things, the right way.



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6.2.04.08 Understands project quality Management

C.Perform Quality Control

The observation techniques and activities used to fulfill requirements for quality

The control can be :

- **Optical**
- **Sample** (The percentage is determined on the basis of parameters such as historical elements, levels of reliability requirements, etc.)
- **Destructive** (when the product to check if it meets the specifications must necessarily be destroyed)

Quality **Control** makes sure the results of what you've done are what you expected.

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6.2.04.08 Understands project quality Management

C. Perform Quality Control

Terminology	first use	Description
Statistical quality control (SQC)	1930s	The application of statistical methods (specifically control charts and acceptance sampling) to quality control. ^[5] ⁵⁵⁶
Total quality control (TQC)	1956	Popularized by Armand V. Feigenbaum in a Harvard Business Review article ^[6] and book of the same name. ^[7] Stresses involvement of departments in addition to production (e.g., accounting, design, finance, human resources, marketing, purchasing, sales).
Statistical process control (SPC)	1960s	The use of control charts to monitor an individual industrial process and feed back performance to the operators responsible for that process. Inspired by control systems .
Company-wide quality control (CWQC)	1968	Japanese-style total quality control ^[7]
Total Quality Management (TQM)	1985	Quality movement originating in the United States Department of Defense that uses (in part) the techniques of statistical quality control to drive continuous organizational improvement. ^[8]
Six Sigma (6σ)	1986	Statistical quality control applied to business strategy. ^[9] Originated by Motorola

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ESLog - MODULE D : CHANGE AND PROJECT MANAGEMENT

6.2.04.09 Implements a continuous improvement programme



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6.2.04.09 Implements a continuous improvement programme

A. Select a comprehensive approach

a **continuous improvement process** (abbreviated as **CIP** or **CI**), is an *ongoing effort* to improve products, services, or processes. These efforts can seek "incremental" improvement over time or "breakthrough" improvement all at once.

Delivery (customer valued) processes are constantly evaluated and improved in the light of their *efficiency, effectiveness and flexibility*.

It is not limited to quality initiatives. Improvement in business strategy, business results, customer, employee and supplier relationships can be subject to continual improvement

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6.2.04.09 Implements a continuous improvement programme

A. Select a comprehensive approach

KAIZEN Approach

(the translation of kai ("change") zen ("good") is "improvement").

- **Feedback:**

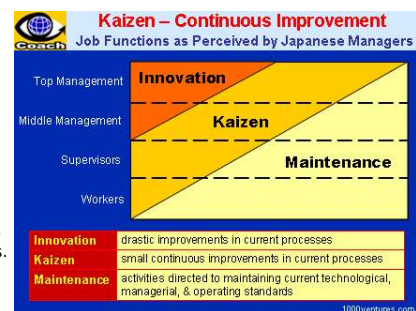
The core principle of CIP is the (self) reflection of processes.

- **Efficiency:**

The purpose of CIP is the identification, reduction, and elimination of suboptimal processes.

- **Evolution:**

The emphasis of CIP is on incremental, continual steps rather than giant leaps.



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6.2.04.09 Implements a continuous improvement programme

A. Select a comprehensive approach

KAIZEN Approach


Key features of kaizen include:

- Improvements are based on **many small changes** rather than the radical changes that might arise from Research and Development
- As the ideas come from the workers themselves, they are less likely to be radically different, and therefore **easier to implement**
- Small improvements require **low capital investment**
- The ideas come from the **talents** of the existing workforce
- All employees **improve their own performance**
- Workers take **ownership** for their work and help reinforce team working

The elements above are the more tactical elements of CIP.

The more strategic elements include deciding how to increase the value of the delivery process output to the customer (**effectiveness**) and how much **flexibility** is valuable in the process to meet changing needs.

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6.2.04.09 Implements a continuous improvement programme

A. Select a comprehensive approach

Key factors for a successful Continuous Improvement Program

1. Leadership that walks the talk
2. Focus on "fire prevention" rather than "fire fighting"
3. Constancy of purpose to retain changes
4. Shift to long term mind-set

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6.2.04.09 Implements a continuous improvement programme


B. Implement systematic management in connection with strategic objectives

B1. Select appropriate tools

B2. Budget and Timeplan

B3. Διαχείριση προσδοκιών

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6.2.04.09 Implements a continuous improvement programme

C. Implementation of roles and responsibilities

- C1. *Management Structure and Governance***
- C2. *Steering Committee***
- C3. *Overall Champion***
- C4. *Team leaders***
- C5. *Process Owners***
- C6. *Facilitators***

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6.2.04.09 Implements a continuous improvement programme

D. Apply a Continuous Improvement Tool

- D1. Visual displays**
- D2. Standard Work**
- D3. Tracking for Sustainability**
- D4. Sharing best practices, community of practice**

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6.2.04.09 CHANGE MANAGEMENT

(Refer to the slides in the chapter Change Management του EJL)

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Training for European Logistician -
Operational level (EJLog)

MODULE D :
**CHANGE AND
PROJECT MANAGEMENT**
(additional May 2016)

Presentation prepared by : **Kostas Theofanides**

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EJlog - MODULE B : CORE MANAGEMENT SKILLS

4.1.02.02 Understands the principles of change management



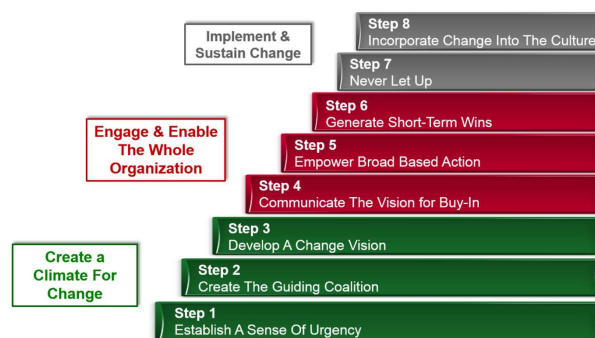
103

4.1.02.02 Understands the principles of change management

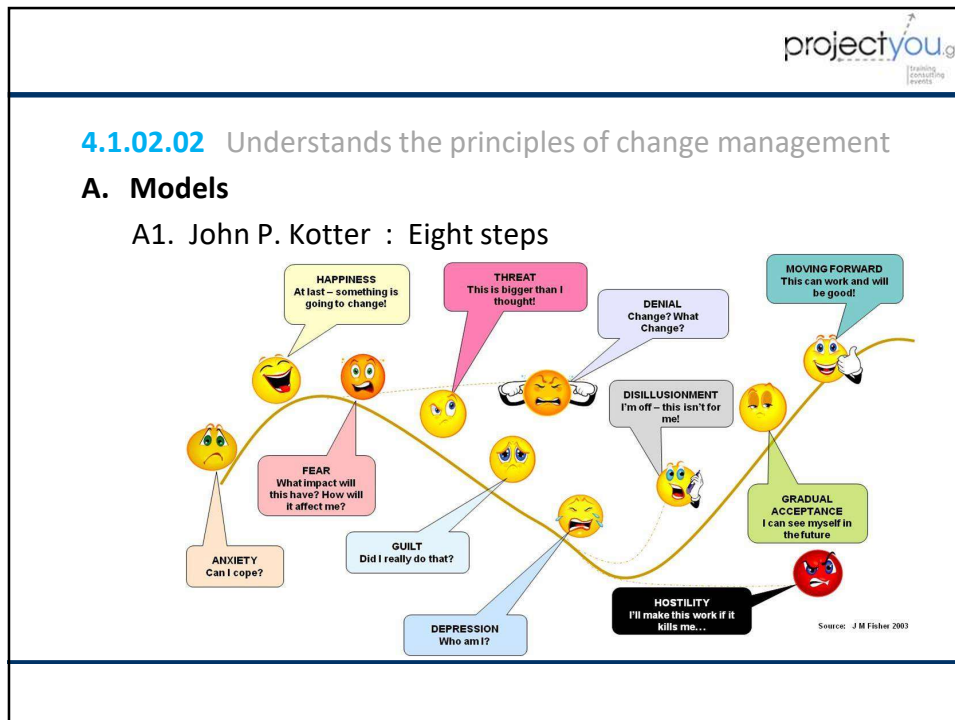
A. Models

A1. John P. Kotter : Eight steps

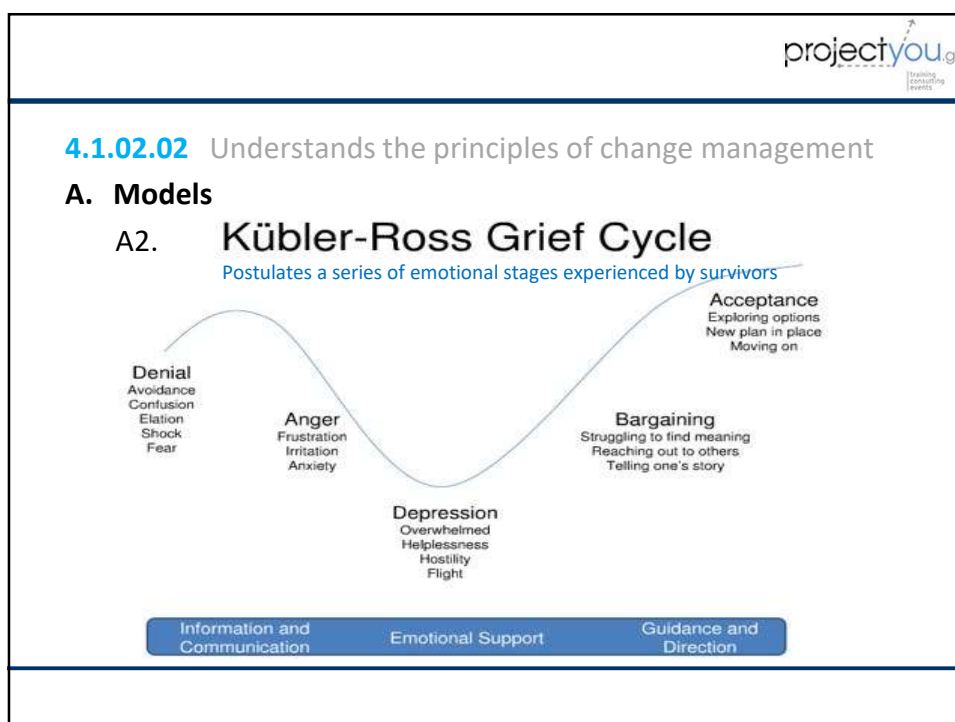
Describes how Leaders successfully transform business



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4.1.02.02 Understands the principles of change management

A. Models

A3. Bridge's transition model

Helps you understand how people feel as you guide them through change.

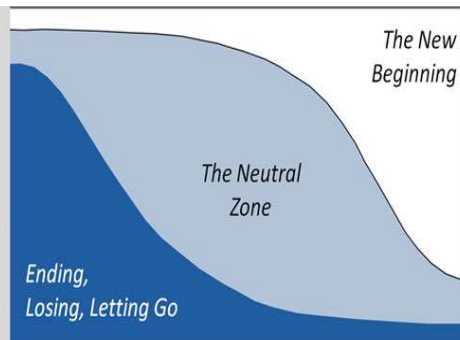
Three phases of transitions:

Endings: Letting go of the old ways and the old identity people had

Neutral zone: Realignments and re-patterning take place

New beginning: Establish the new identity and new sense of purpose that makes the change stick

Bridges, W. (2009). Managing transitions: Making the most of change (3rd ed.). London: Nicholas Brealey.



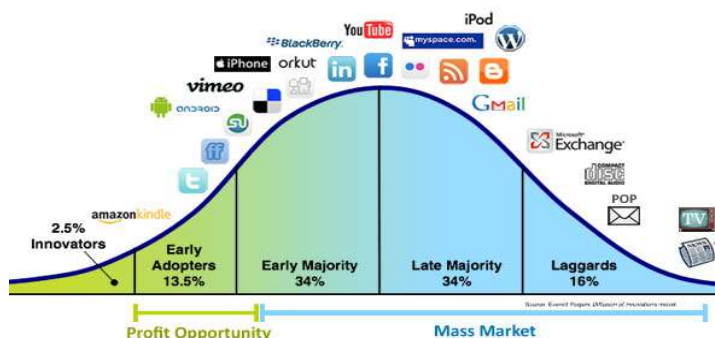
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4.1.02.02 Understands the principles of change management

A. Models

A4. Roger's technology Adoption

Curve illustrate product adoption to better understand how new ideas and technologies spread especially in today's digital culture.



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4.1.02.02 Understands the principles of change management

A. Models

A5. Prosci's ADKAR Model

An outcome-oriented approach to facilitate individual change.


ADKAR Elements	Factors Influencing Success
Awareness of the need for change	<ul style="list-style-type: none"> A person's view of the current state How a person perceives problems Credibility of the sender of awareness messages Circulation of misinformation or rumors Contestability of the reasons for change
Desire to support and participate in the change	<ul style="list-style-type: none"> The nature of the change (what change is and how it will impact each person) The organizational or environmental context for the change (his or her perception of the organization or environment that is subject for change) Each individual person's situation What motivates a person (those intrinsic motivators that are unique to an individual)
Knowledge of how to change	<ul style="list-style-type: none"> The current knowledge base of an individual The capability of this person to gain additional knowledge Resources available for education and training Access to or existence of the required knowledge
Ability to implement required skills and behavior	<ul style="list-style-type: none"> Psychological blocks Physical capabilities Intellectual capability The time available to develop the needed skills The availability of resources to support the development of new abilities
Reinforcement to sustain the change	<ul style="list-style-type: none"> The degree to which reinforcement is meaningful and specific to the person impacted by the change The association of the reinforcement with actual demonstrated progress or accomplishment The absence of negative consequences An accountability system that creates an ongoing mechanism to reinforce the change

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4.1.02.02 Steps for Change Management

1. We understand the need for Change
2. Communicating Vision
3. Remove obstacles
4. We reward actions towards Change
5. We implement Change
6. We keep the Change

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4.1.02.02 Understands the principles of change management

B. Principles

B1. Understand the need for change

Methods:


- Discuss which will be the future if don't change
- Refer to the benefits from change
- Mention others who already changed
- Focus on long run benefits instead short term difficulties

B2. Communicate vision

Methods:

- Lead by example ("walk the talk")
- Assign the right persons to communicate the vision
- Use the right media, which impact significantly on the audience
- Select the right time and location

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4.1.02.02 Understands the principles of change management

B. Principles

B3. Remove obstacles

Methods:


- Predict the obstacles
- Plan actions to remove or bypass or weakening obstacles
- Decide the right timing for removal
- Act decisively without setbacks

B4. Empower actions

Methods:

- Congratulate in public the actions towards change
- Reprove the resistance makers in private
- Set clear individual and team objectives
- Establish a motivation scheme

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4.1.02.02 Understands the principles of change management

B. Principles

B5. Implement change

Methods:


- Set specific Action Plan
- Define responsibilities (RACI chart)
- Build a Project Plan
- Set a progress review and monitoring process

B6. Sustain change

Methods:

- Implement quick wins first
- Celebrate successes
- Put the right persons in the critical posts
- Communicate officially the achieved changes
- Isolate changes blockers and criticism
- Incorporate change into the culture

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4.1.02.02 Understands the principles of change management

C. Various

C1. Strategies for change

1. Empirical - Rational (E-R)

People are logical beings and will follow their interests as long as they understand them. Successful change requires effective communication of change and incentives related to people.

This strategy is the carrot side in carrot-whip administration.

In order to be selected, there must be strong incentives and small risks.

2. Normative – Reeducative (N-R)

People are social beings and follow rules and values. The change will be successful if the rules and values are redefined and a commitment to the new ones develops. The majority of people want to go with the “flow”. Because it is related to people's culture and culture does not change quickly, this strategy is not recommended in direct application changes.

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4.1.02.02 Understands the principles of change management

C. Various

C1. Strategies for change

3. Power - Coercive (P-C)

People are disciplinary beings and they will do what they will be ordered to do. Successful change is based on the exercise of power and the imposition of sanctions. Surprisingly in many cases people want and quickly accept this strategy. This strategy is the side of the "whip" in the "carrot-whip" administration. This strategy is chosen when there are two factors :

- a. Immediate Reaction Time
- b. Threat severity (it is a prerequisite for the whole world to understand the seriousness of the threat, which is not often the case in practice)

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4.1.02.02 Understands the principles of change management

C. Various

C1. Strategies for change

4. Environmental – Adaptive (E-A)

People **resist on** loss and disruption but adapt easily to new conditions. The change is based on the creation of a new organization to which people are gradually transferred from the old one. The burden of change is transferred from management to people. This strategy exploits the natural characteristic of people's adaptability and survives the various complications that trying to change people and culture can cause. This strategy is suitable for radical changes and not gradual. It can be applied to either urgent or slow changes. An important parameter, however, is the availability of people from within the existing organization who will be able to set up the new organization. New executives are often recruited from the market

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C. Various

C1. Strategies for change

Mix of strategies

Because situations are complex, a mixture of strategies is usually applied depending on the following conditions :

- **degree of change** (for radical changes the E-A)
- **degree of resistance** (for strong resistance fits combination P-C and E-A)
- **population size** (the larger the size, the more strategies need to coexist in the mix)
- **At stake** (when it is large, it is preferable to P-C)
- **Time** (for urgent changes, P-C preferred)
- **Dependence** (if the organization depends on people, its ability to impose is limited; respectively, when people depend on the organization, their mood for resistance is limited)

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C. Various

C2. Tips for change

1. Address the "human side" systematically
2. Start at the top
3. Involve every layer
4. Make the formal case
5. Create ownership
6. Communicate the message
7. Assess the cultural landscape
8. Address culture explicitly
9. Prepare for the unexpected
10. Speak to the individual

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C. Various

C3. Change Agent - 1

DEFINITION :

change agent : People who act as catalysts for change...accelerate the implementation of change...

Characteristics of Change Agent :

1. Clear Vision

- A "change agent" does not have to be the person in authority, but they do however have to have a clear vision and be able to communicate that clearly with others.
- People can be frustrated if they feel that someone tends to change their vision often. This will scare away others as they are not sure when they are on a sinking ship and start to looking for ways out.

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C. Various

C3. Change Agent - 2

Characteristics of Change Agent :

2. Patient yet persistent

- Change does not happen overnight and most people know that.
- To have sustainable change that is meaningful to people, it is something that *they* will have to embrace and see importance.
- Most people need to experience something before they really understand that.
- Not everyone moves at the same pace. Every step forward is a step closer to a goal;
- Change agents just help to make sure that people are moving ahead

3. Asks tough questions

- It is when people feel an emotional connection to something is when they will truly move ahead. Asking questions focusing on, "What it means to you", "What it means to our company" and helping people come to their own conclusions based on their experience is when you will see people have ownership in what they are doing
- Ask questions to help people think, don't alleviate that by telling them what to do.

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C. Various

C3. Change Agent - 3

Characteristics of Change Agent :

4. Knowledgeable and leads by example

- Leaders must have "character and credibility";
- they are not just seen as good people but that they are also knowledgeable in what they are speaking about.
- If you want to create "change", you have to not only be able to articulate what that looks like, but show it to others.

5. Strong relationships built on trust

- All of the above, means nothing if you do not have solid relationships with the people that you serve.
- People will not want to grow if they do not trust the person that is pushing the change.
- The change agents must be extremely approachable and reliable.

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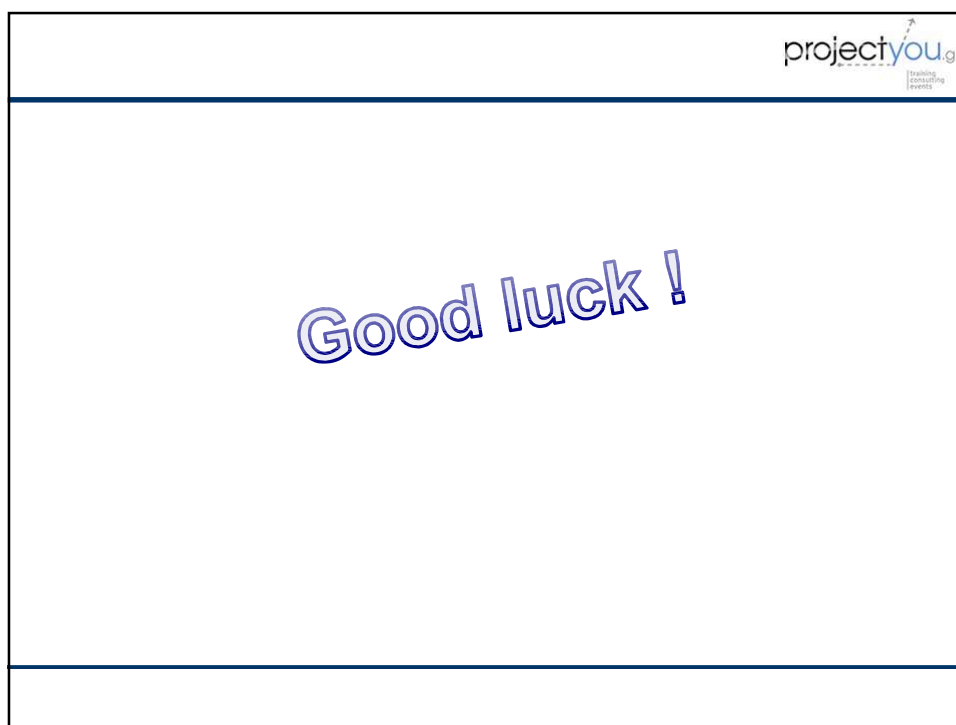
C. Various

C3. Change Agent - 4

Roles of a Change Agent

- Change agents aim at making changes in the existing processes or culture of the organization that sticks. And to do so, they focus on the matters relating to organizational effectiveness, innovation, and advancement.
- Always seeks an opportunity for change, determines the best approach and bring about change. Possesses skills and competencies to initiate, facilitate and coordinate organizational change.
- Change Agents help the organization in understanding the requirement and relevance for change and takes all necessary steps required to manage change and also anticipates the problem;
- He is responsible to transform vision into a realistic plan and execute it.

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