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A man and a woman are standing in front of a whiteboard. The man is pointing at the whiteboard, which has the PCT Model diagram drawn on it. The woman is looking at the whiteboard and taking notes. The whiteboard has the title 'PCT Model' and a diagram of a triangle with 'Objectives', 'Goals', and 'Profit' written inside. There are also some handwritten notes and a smiley face.

Agenda

The PCT Model:
Tracking Project Health

A diagram of the PCT Model. It is a triangle with 'Leadership/Sponsorship' at the top, 'Project Management' at the bottom left, and 'Change Management' at the bottom right. In the center of the triangle is a circle containing a trophy icon and the word 'Success'.

PCT Model

PCT Assessment

PCT Application

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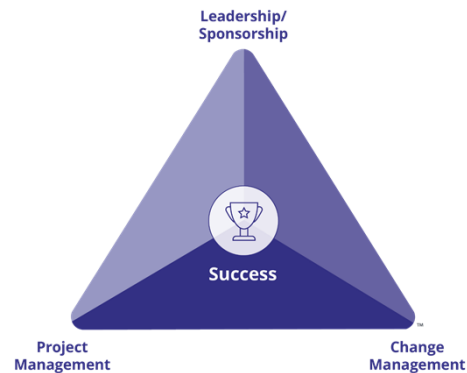
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The Prosci Change Triangle (PCT) Model: Tracking Project Health

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Prosci Project Change Triangle (PCT) Model

- Created in 2006
- Based on client interactions
- A framework that describes the required elements needed for initiatives to be successful
- Projects are at risk if any of the four elements is missing
- A unified value proposition for delivering successful outcome and benefit realization



Prosci Change Triangle
(PCT) Model

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“Those who trust to chance
must abide by the results of chance.”

Calvin Coolidge

*30th president of the United States
1923 to 1929*

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The Prosci Change Triangle (PCT) Model: Tracking Project Health

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Looking Back

July 13, 2006

Introducing the Prosci Change Triangle

Internet Archive

WayBackMachine

21 captures

27 Aug 2006 - 14 Aug 2016

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Change Management Learning Center

Prosci Change Triangle

Introduction

Why do some change initiatives fail while others succeed? The answer is not as complex as you might think. Prosci's research with organizations from public and private sectors reveals that the secret behind successful transformations can be distilled into a simple yet powerful model described by the **Prosci Change Triangle**. This tutorial series presents this model and will help you assess if you have the necessary ingredients for success.

The model

Think of the **Prosci Change Triangle** as a three-legged stool. The first leg is **executive leadership**. This leg represents the formulation of the strategy and direction for an organization, and the required leadership to set the necessary changes into motion.

The second leg is **project management**. This leg represents the fundamentals of managing a project, including the design of work tasks and the management of resources to implement a change on time and on budget.

The final leg is **change management** – the people side of the change. This leg represents the actions taken by the organization to help employees transition from the current state to the desired future state.

Figure 1 shows these three essential elements for realizing effective change.

Leadership/
sponsorship

Projects meet objectives

Projects finish on time and on budget

Return on investment (ROI) realized

Project management

Change management

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Prosci Change Triangle

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Evolution of the PCT Model

Leadership/
sponsorship

Projects meet objectives

Projects finish on time and on budget

Return on investment (ROI) realized

Project management

Change management

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Prosci Change Triangle

Leadership/
Sponsorship

Projects meet objectives

Projects finish on time and on budget

Return on investment (ROI) realized

Project Management

Change Management

Prosci PCT Profile

The Prosci PCT Model is a trademark of Prosci.

Leadership/
Sponsorship

Project Management

Change Management

Success

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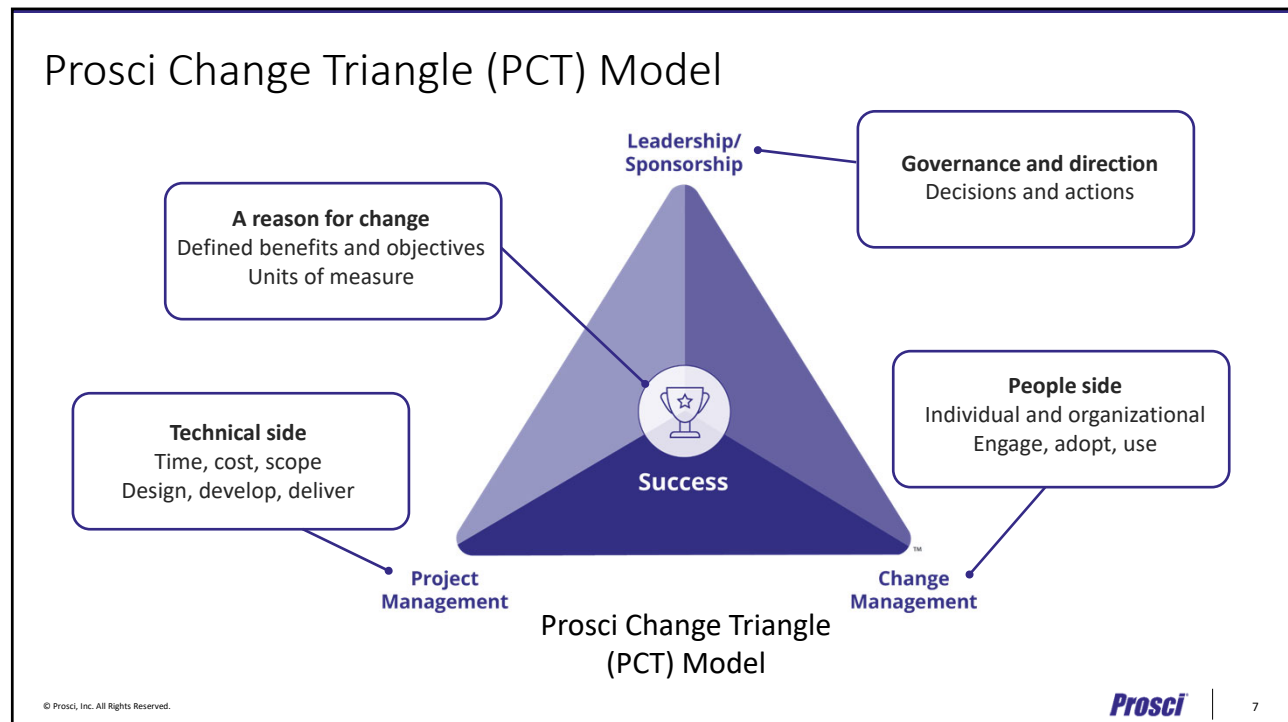
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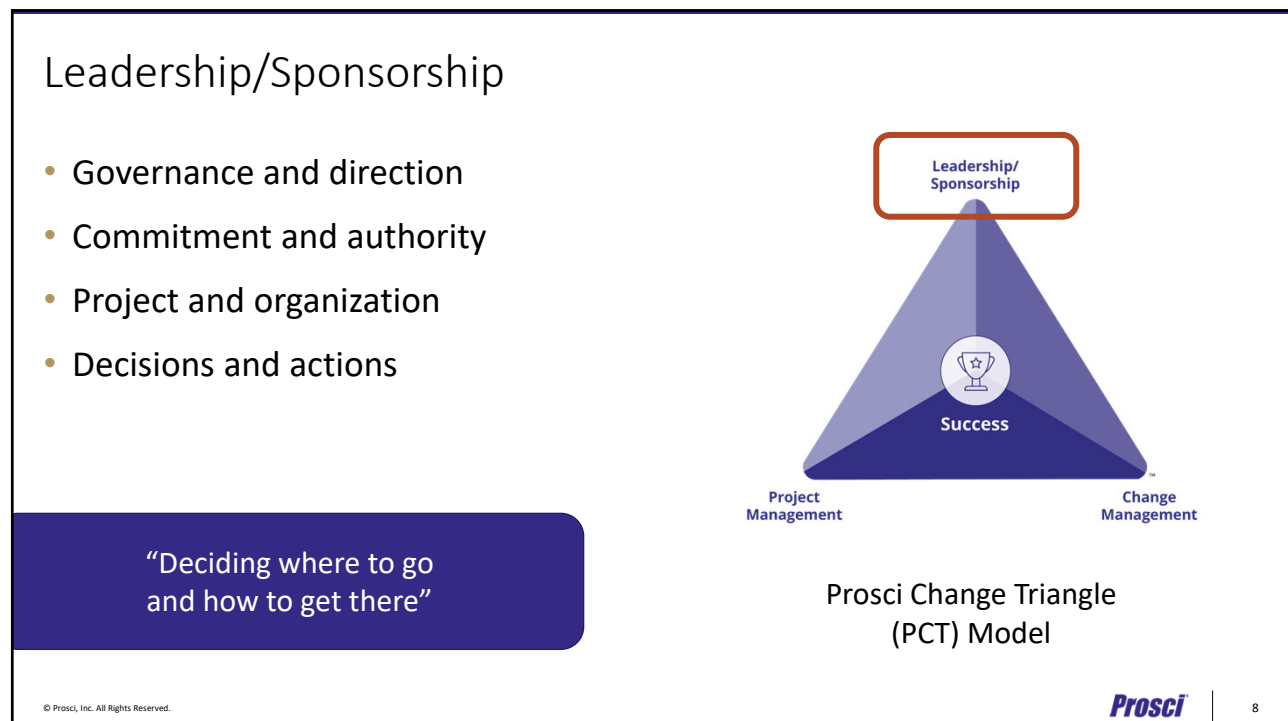
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Project Management

- Technical side
- Change definition
- Time, cost, scope
- Tasks, resources, budget
- Defined deliverables

“Designing the solution to get there.”



Prosci Change Triangle (PCT) Model

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Change Management

- People side
- Bridge implementation and realization
- Individual and organizational
- Current to future state
- Process and tools

“Ensuring our people get there, too.”



Prosci Change Triangle (PCT) Model

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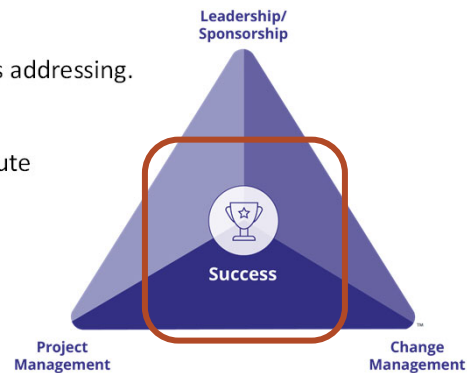
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Success

- **The Reason For Change:**
 - The opportunity the organization is seizing or the issue it is addressing.
- **Project Objectives:**
 - What the project/initiative delivers or produces to contribute to solving the problem or realizing the opportunity?
- **Organizational Benefits:**
 - What the organization gains if the initiative is successful?



"The 'there' where we are going."

Prosci Change Triangle (PCT) Model

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Connections: Leadership Decisions

- Resources
- Scope
- Time



What needs to be designed, developed and delivered?

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Connections: Leadership Actions

- Active and visible
- Build coalitions
- Communication



How leaders uniquely contribute to individual change journeys?

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Connections: Integrated Approach

- People
 - Who does the work?
- Process
 - How the work gets done?
- Tools
 - What we use to do the work?



Complementary disciplines with a common objective

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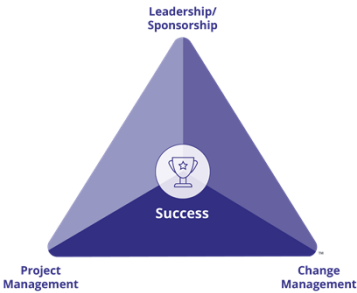
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Agenda

The PCT Model: Tracking Project Health



PCT Model

PCT Assessment

PCT Application

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Success

Success	Score: 1-3
1. Inputs into the change management process are defined (may include a business case, charter, scope, or plan).	
2. Organizational benefits are fully defined (what the organization gains).	
3. Project objectives are fully defined (what the project achieves).	
4. Adoption and usage objectives are fully defined.	
5. Units of measure for benefits and objectives are established.	
6. Benefits and objectives are prioritized.	
7. Benefit and objective ownership is designated.	
8. People dependency of benefits and objectives is evaluated.	
9. The definition of success is clear and ready to be communicated.	
10. The sponsorship coalition is aligned to a common definition of success.	
Sum of points for Success (out of 30 total)	0

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Leadership/Sponsorship

Leadership/Sponsorship	Score: 1-3
1. The change has a primary sponsor with the necessary authority over the people, processes and systems to authorize and fund the change.	<input type="checkbox"/>
2. The primary sponsor can clearly explain the nature of the change, the reason for the change, and the benefits for the organization.	<input type="checkbox"/>
3. The organization has a clearly defined vision and strategy.	<input type="checkbox"/>
4. The change is aligned with the strategy and vision for the organization.	<input type="checkbox"/>
5. Priorities are set and communicated regarding the change and other competing priorities.	<input type="checkbox"/>
6. The primary sponsor is resolving issues and making decisions related to the project schedule, scope and resources.	<input type="checkbox"/>
7. The primary sponsor is actively and visibly participating throughout the lifecycle of the change.	<input type="checkbox"/>
8. The primary sponsor is encouraging senior leaders to participate in and support the change by building a sponsor coalition.	<input type="checkbox"/>
9. The primary sponsor is building awareness of the need for the change directly with employees.	<input type="checkbox"/>
10. The primary sponsor is visibly reinforcing the change by celebrating successes and addressing resistance.	<input type="checkbox"/>
Sum of points for Leadership/Sponsorship (out of 30 total)	0

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Project Management

Project Management	Score: 1-3
1. The nature of the change is clearly defined including who is impacted and how.	<input type="checkbox"/>
2. The project has specific objectives.	<input type="checkbox"/>
3. The project has a clearly defined scope.	<input type="checkbox"/>
4. The project has a project manager assigned to manage the project lifecycle.	<input type="checkbox"/>
5. Project milestones are identified and a project schedule is complete.	<input type="checkbox"/>
6. A work breakdown structure with deliverables is complete.	<input type="checkbox"/>
7. Resources for the project are identified and acquired.	<input type="checkbox"/>
8. Periodic meetings are scheduled with the project team and key stakeholders to track progress and resolve issues.	<input type="checkbox"/>
9. The project manager understands the value of change management in ensuring the change will be adopted and used.	<input type="checkbox"/>
10. The Change Management Plan is integrated with the Project Management Plan.	<input type="checkbox"/>
Sum of points for Project Management (out of 30 total)	0

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Change Management

Change Management	Score: 1-3
1. The change is applying a structured change management approach to deliver the benefits to the organization.	
2. An assessment of the change and its impact on individuals and the organization is complete.	
3. An assessment of the change risk is complete.	
4. The change has specific adoption and usage objectives.	
5. An assessment of the strength of the sponsor coalition is complete.	
6. A customized and scaled change management strategy with the necessary sponsorship commitment is complete.	
7. The resources required to execute the change strategy and plans are identified, acquired and prepared.	
8. Change management plans that will mitigate resistance and achieve adoption and usage are complete and are being implemented.	
9. The effectiveness of change management is being monitored and adaptive actions are being taken if required to achieve adoption and usage.	
10. The organization is prepared to own and sustain the change.	
Sum of points for Change Management (out of 30 total)	0

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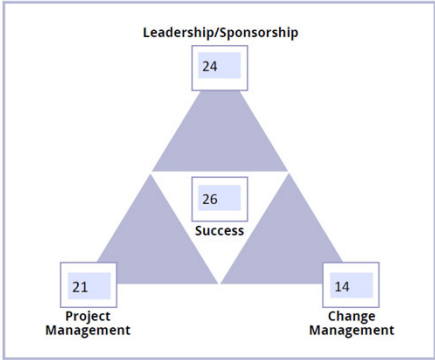
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PCT Profile

PCT Profile:



Score interpretation:

10-19	High risk/threat – needs immediate action
20-24	Alert/possible risk – needs further investigation
25-30	Strength – should be leveraged and maintained

Notes

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Example PCT Profiles



- Initiation
- Entire effort in threat



- People and technical sides ready
- Not sure where to go



- Early-stage
- Project shaping



- Leader and people mobilized
- Technical-side threat



- Building momentum
- Leadership/sponsorship driven



- Leaving the people side of change to chance

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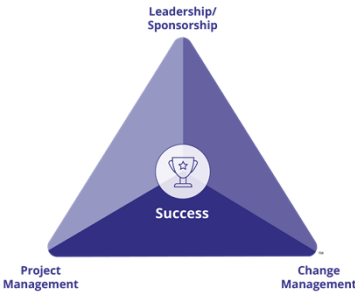


Agenda

The PCT Model:

Tracking Project Health

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PCT Model

PCT Assessment

PCT Application

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PCT Applications

Conduct Assessment

Evaluate Project Health

Identify Risk Factors

Drive Next Steps

Track Progress Over Time

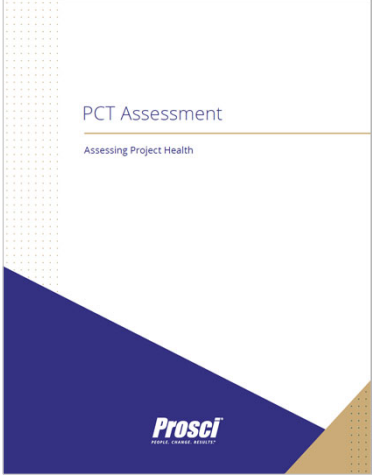
Examine the Portfolio

Create Shared Vision

Conduct Assessment

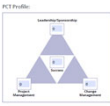
PCT Assessment

Assessing Project Health



PCT Assessment Analysis

PCT Profile:



Score Interpretation:

10-19	High risk/threat - needs immediate action
20-24	Alert/possible risk - needs further investigation
25-30	Strength - should be leveraged and maintained

Notes:

PCT Assessment

The Prosci Change Triangle (PCT) Model is a simple but powerful framework for understanding the four critical aspects of any successful change effort:

- Success depends on the role of project of the initiative.
- Leadership/sponsorship provides strategy, direction and guidance.
- Project management addresses the tactical plan of change by designing, developing and delivering the solution.
- Change management addresses the people side of change by creating a positive environment and using the solution to achieve results and outcomes.

Why:

The PCT assessment is used to position the project for success by assessing project health across the four critical aspects at a point in time. If a project is weak in any of the four elements, it will struggle or fail. PCT assessment scores are a leading indicator of the potential for a successful implementation.

The PCT Model is valuable for project teams and change management professionals in a number of ways:

- Provides project teams with common language and context for the four elements of successful change.
- Positions the unique contribution of change management relative to project management and leadership/sponsorship.
- Establishes the health of an initiative at a point in time. Through repeated application, it evaluates progress over the project lifecycle.
- Identifies organizational competencies and gaps by looking at assessment results from multiple projects.

When:

Complete an initial PCT assessment early in the lifecycle of the project to establish a baseline. Conduct the assessment again at key points during the project to see if scores are improving. Each time the assessment is conducted, create a list of action plans to improve performance where scores are low.

Who:

The PCT assessment can be completed by the change management team, project team, senior leaders and key business leaders from the impacted groups.

PCT Assessment

Section	Score	Weight	Total
1. Leadership/Sponsorship	24	1	24
2. Project Management	21	1	21
3. Change Management	14	1	14
Total	59	3	177

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PCT Applications

Conduct Assessment

Evaluate Project Health

Identify Risk Factors

Drive Next Steps

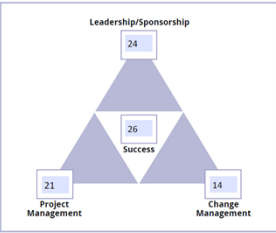
Track Progress Over Time

Examine the Portfolio

Create Shared Vision

Evaluate Project Health

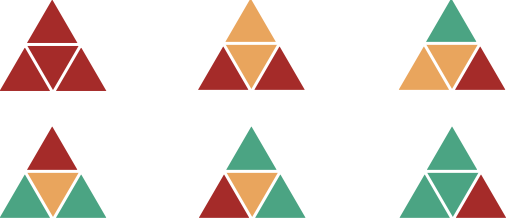
PCT Profile:



Score Interpretation:

10-19	High risk/threat - needs immediate action
20-24	Alert/possible risk - needs further investigation
25-30	Strength - should be leveraged and maintained

Notes:



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US Headquarters: +1 970 203 9332 | solutions@prosci.com

Canada Office: +1 902 826 9020 | info_can@prosci.com

Australia & NZ Office: +61 9810 6264 | info.anz@prosci.com

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PCT Applications

- Conduct Assessment
- Evaluate Project Health
- Identify Risk Factors
- Drive Next Steps
- Track Progress Over Time
- Examine the Portfolio
- Create Shared Vision

Identify Risk Factors

Change Management	Score: 1-3
1. The change is applying a structured change management approach to deliver the benefits to the organization.	3
2. An assessment of the change and its impact on individuals and the organization is complete.	2
3. An assessment of the change risk is complete.	2
4. The change has specific adoption and usage objectives.	1
5. An assessment of the strength of the sponsor coalition is complete.	1
6. A customized and scaled change management strategy with the necessary sponsorship commitment is complete.	2
7. The resources required to execute the change strategy and plans are identified, acquired and prepared.	1
8. Change management plans that will mitigate resistance and achieve adoption and usage are complete and are being implemented.	1
9. The effectiveness of change management is being monitored and adaptive actions are being taken if required to achieve adoption and usage.	1
10. The organization is prepared to own and sustain the change.	2
Sum of points for Change Management (out of 30 total)	16

Score: 1-3

3
2
2
1
1
2
1
1
1
2
16

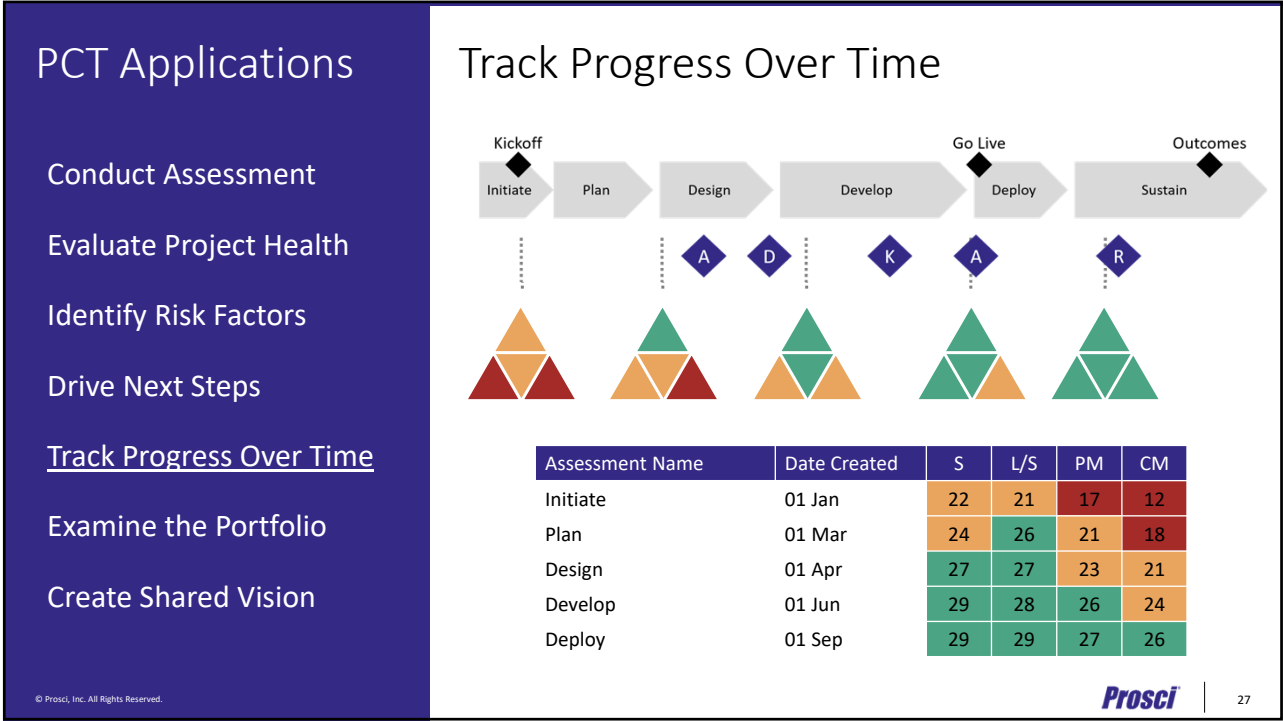
PCT Applications

- Conduct Assessment
- Evaluate Project Health
- Identify Risk Factors
- Drive Next Steps
- Track Progress Over Time
- Examine the Portfolio
- Create Shared Vision

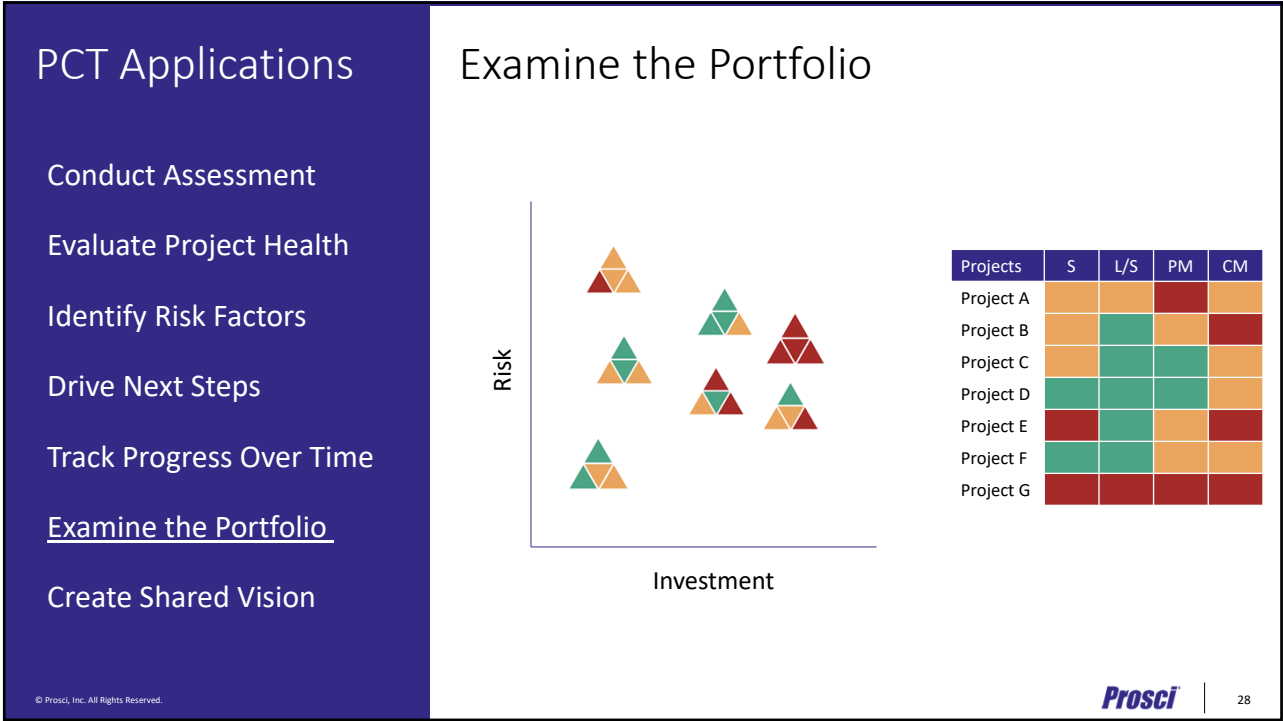
Drive Next Steps

What specific factors need to be addressed to improve project health?

Aspect: (S, L/S, PM, CM)	Factor #	Action



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PCT Applications

- Conduct Assessment
- Evaluate Project Health
- Identify Risk Factors
- Drive Next Steps
- Track Progress Over Time
- Examine the Portfolio
- Create Shared Vision

Create Shared Vision

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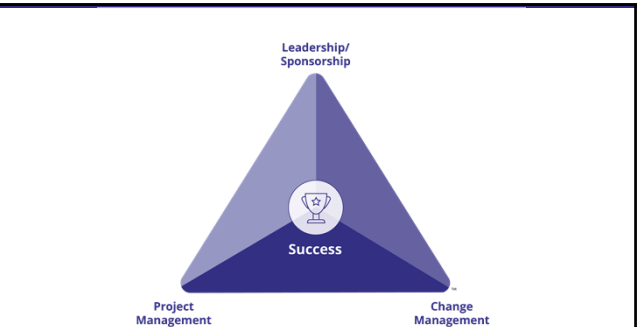
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Agenda

The PCT Model: Tracking Project Health

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Leadership/
Sponsorship

Project Management

Change Management

Success

PCT Model

PCT Assessment

PCT Application

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US Headquarters: +1 970 203 9332 | solutions@prosci.com
Canada Office: +1 902 826 9020 | info_can@prosci.com
Australia & NZ Office: +61 9810 6264 | info.anz@prosci.com

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