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

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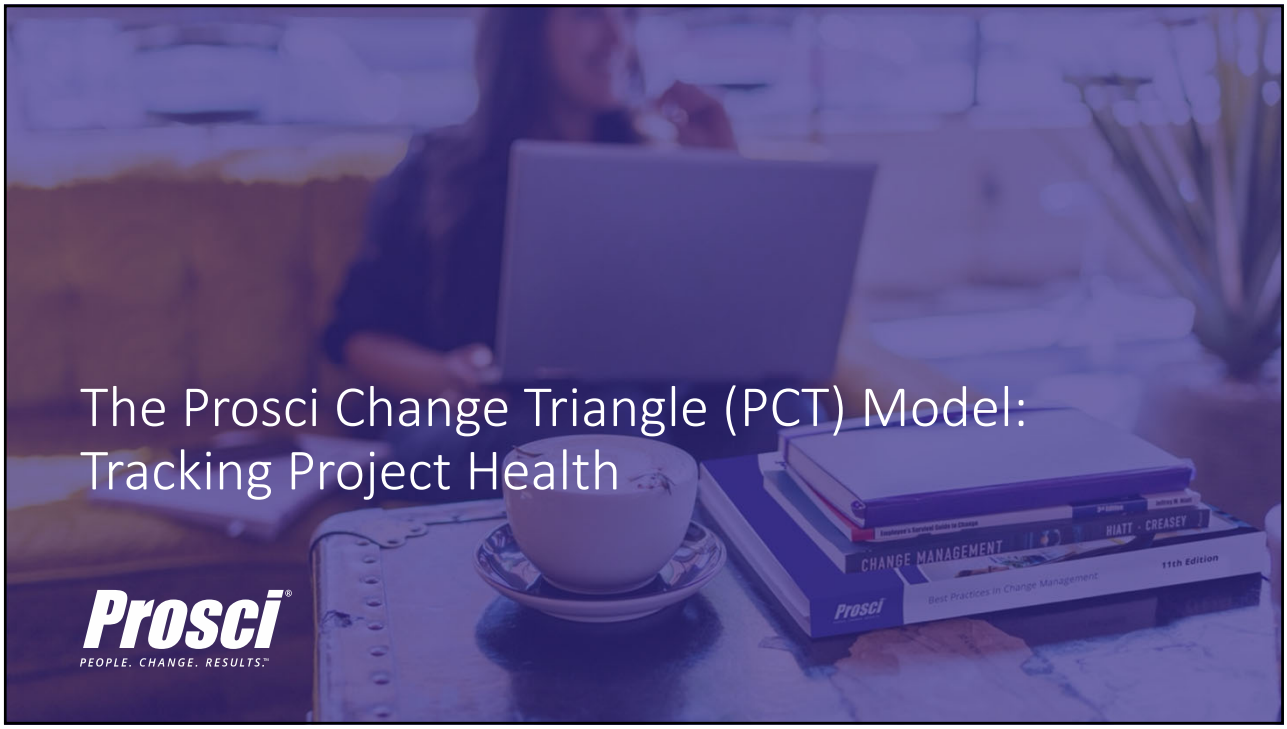

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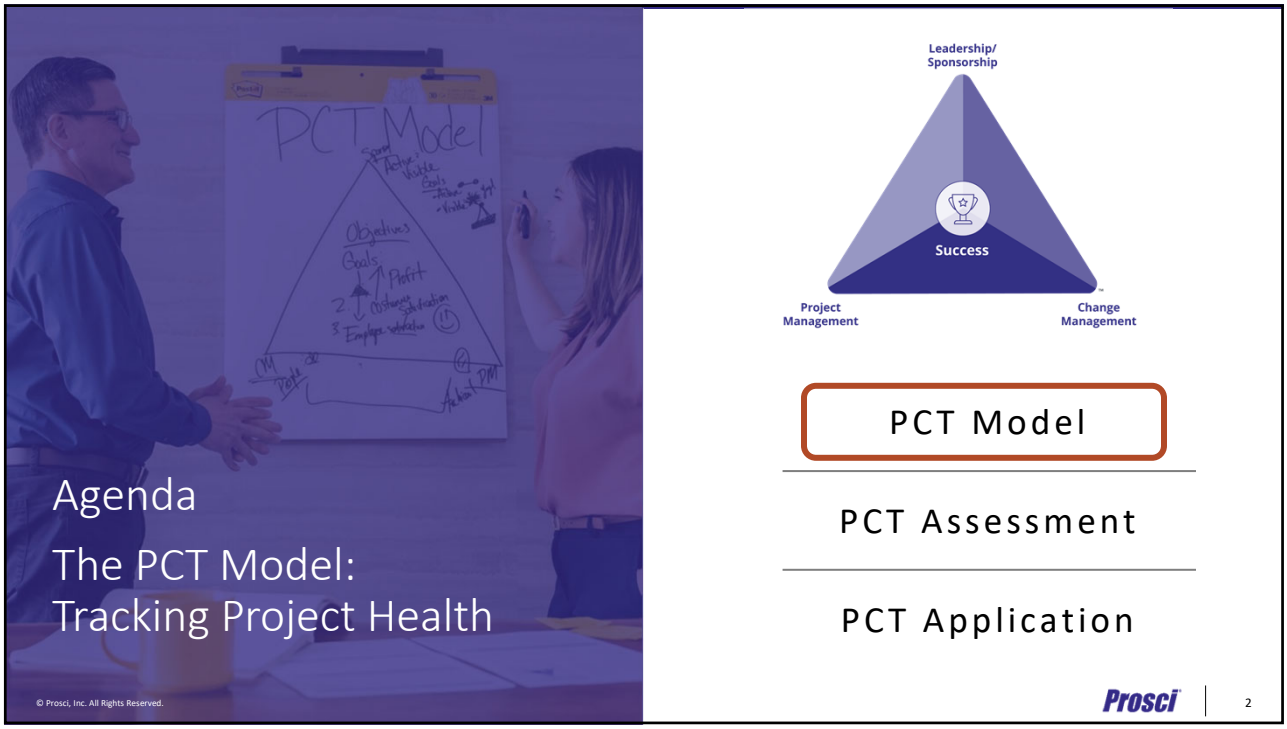

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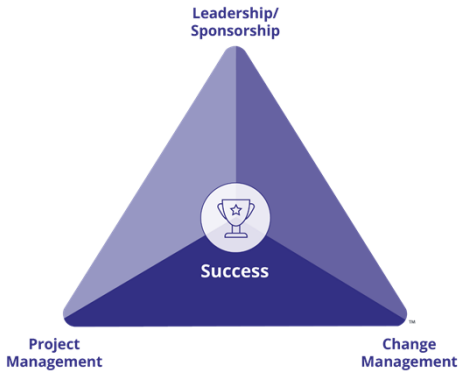
Prosci Project Change Triangle (PCT) Model

- 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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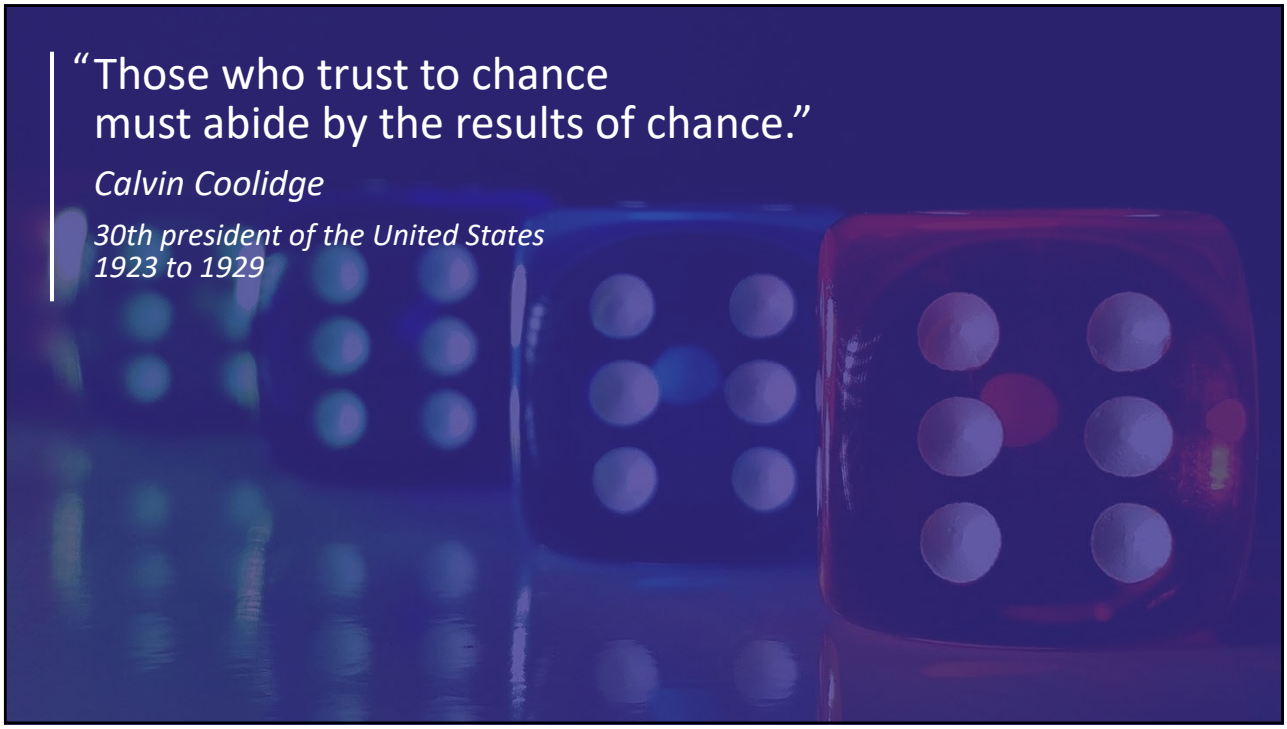
"Those who trust to chance must abide by the results of chance."

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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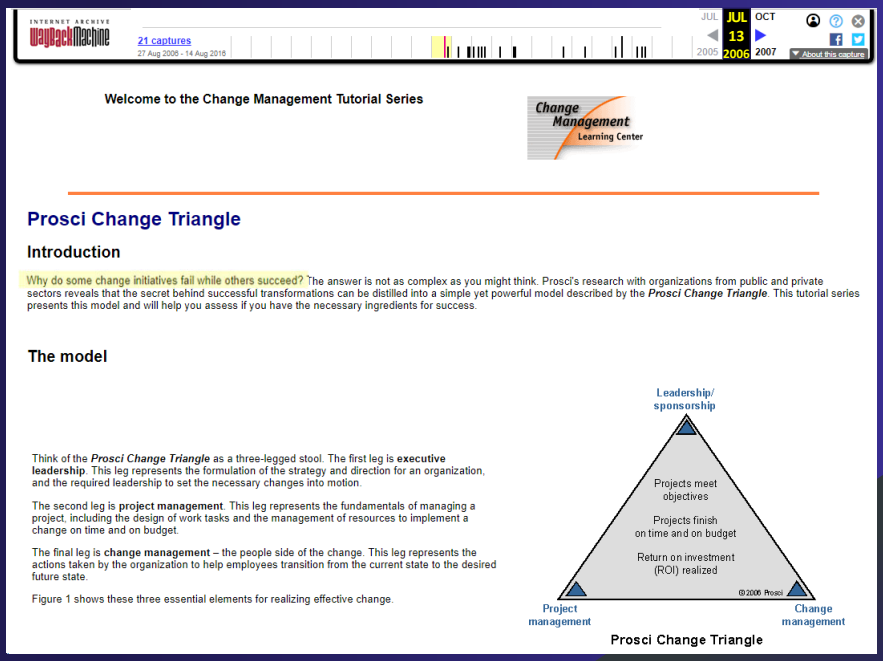
Looking Back

July 13, 2006

WayBackMachine

Introducing the Prosci Change Triangle



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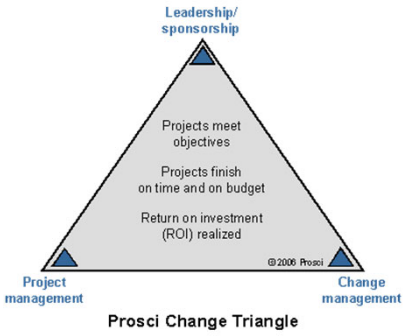
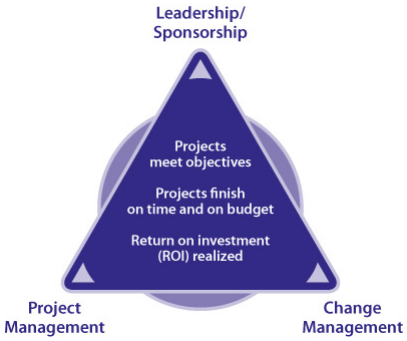
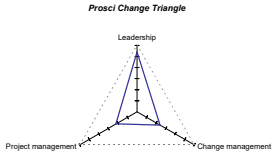
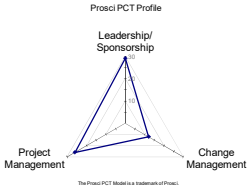
Evolution of the PCT Model









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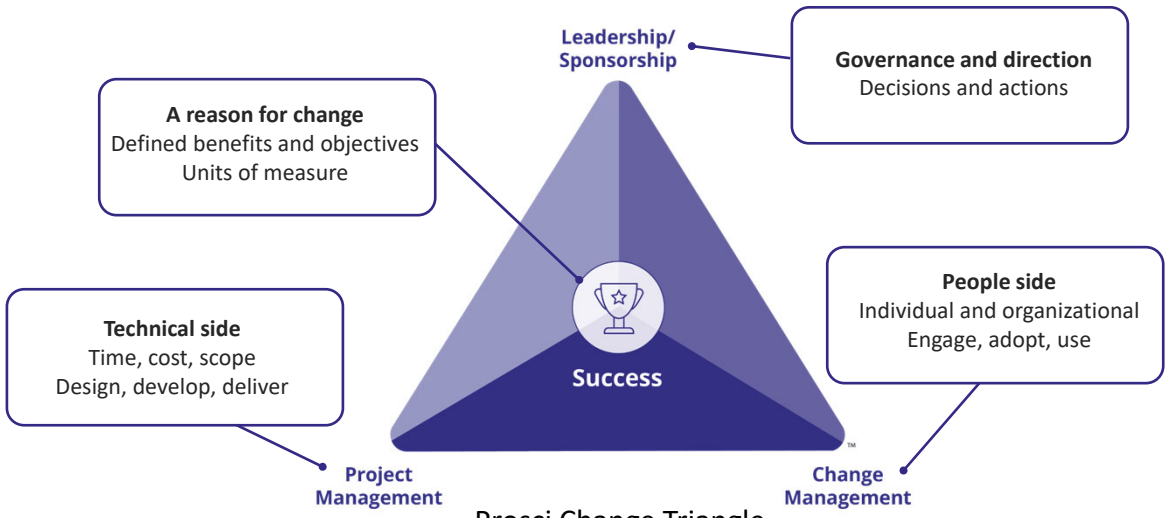

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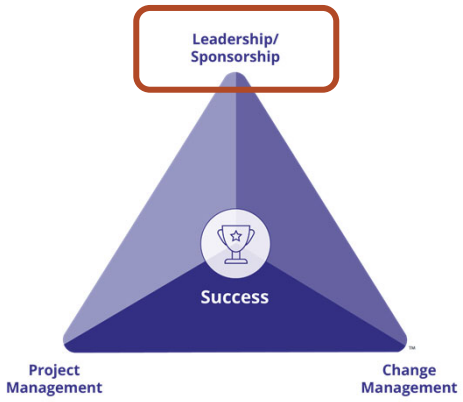
Leadership/Sponsorship

- Governance and direction
- Commitment and authority
- Project and organization
- Decisions and actions

"Deciding where to go and how to get there"



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Project Management

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

"Designing the solution to get there."

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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."

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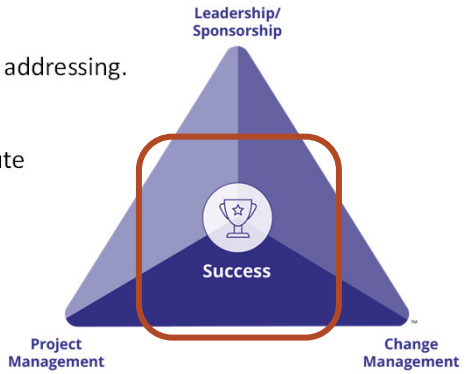
Success

- 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."



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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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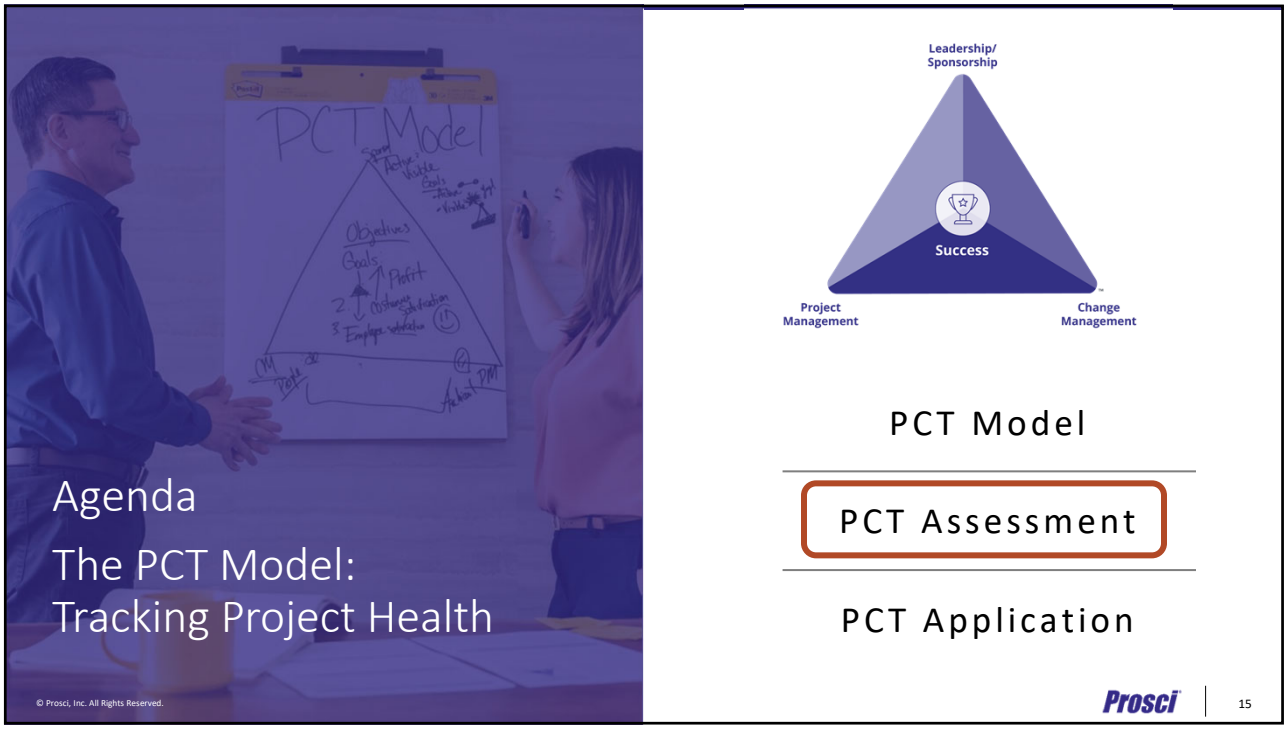

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Success

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.	
2. The primary sponsor can clearly explain the nature of the change, the reason for the change, and the benefits for the organization.	
3. The organization has a clearly defined vision and strategy.	
4. The change is aligned with the strategy and vision for the organization.	
5. Priorities are set and communicated regarding the change and other competing priorities.	
6. The primary sponsor is resolving issues and making decisions related to the project schedule, scope and resources.	
7. The primary sponsor is actively and visibly participating throughout the lifecycle of the change.	
8. The primary sponsor is encouraging senior leaders to participate in and support the change by building a sponsor coalition.	
9. The primary sponsor is building awareness of the need for the change directly with employees.	
10. The primary sponsor is visibly reinforcing the change by celebrating successes and addressing resistance.	
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.	
2. The project has specific objectives.	
3. The project has a clearly defined scope.	
4. The project has a project manager assigned to manage the project lifecycle.	
5. Project milestones are identified and a project schedule is complete.	
6. A work breakdown structure with deliverables is complete.	
7. Resources for the project are identified and acquired.	
8. Periodic meetings are scheduled with the project team and key stakeholders to track progress and resolve issues.	
9. The project manager understands the value of change management in ensuring the change will be adopted and used.	
10. The Change Management Plan is integrated with the Project Management Plan.	
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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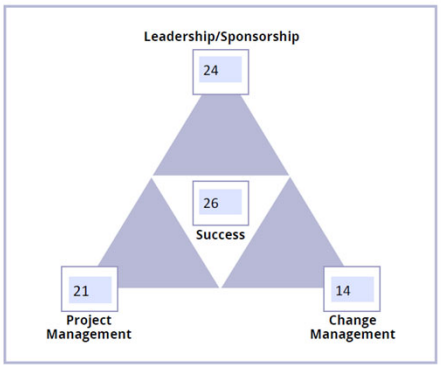
PCT Profile

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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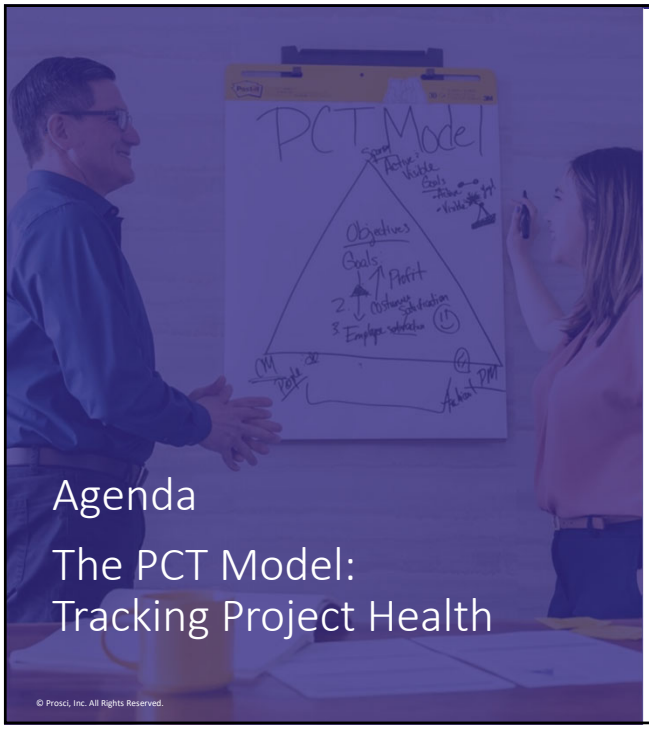

Agenda

The PCT Model: Tracking Project Health

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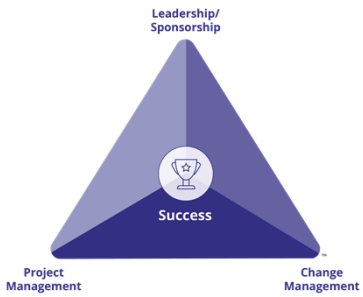

PCT Model

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

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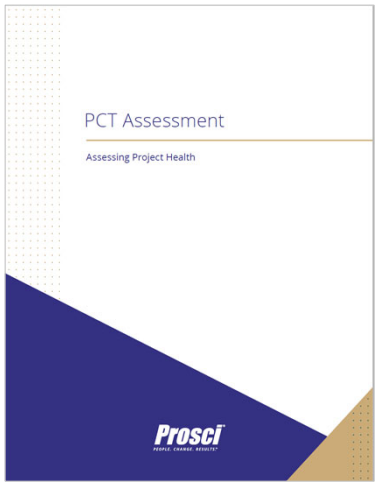
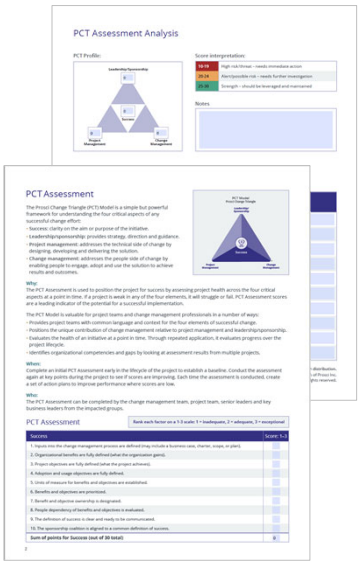
Conduct Assessment





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PCT Applications

- Conduct Assessment
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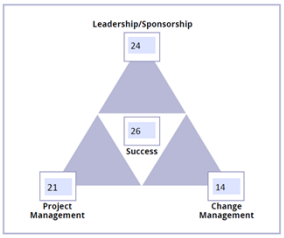
Evaluate Project Health

PCT Profile:



Score interpretation:

10-19	High risk/threat – needs immediate action
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25-30	Strength – should be leveraged and maintained

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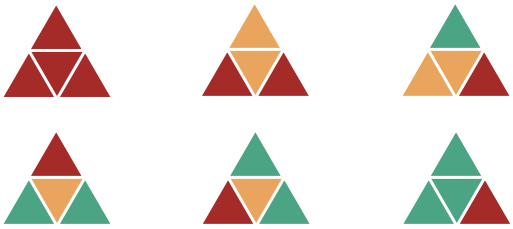

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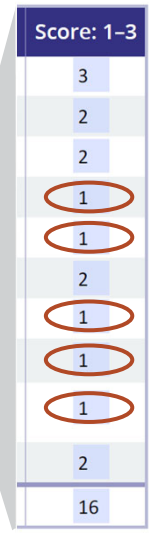
Identify Risk Factors

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



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- Conduct Assessment
- Evaluate Project Health
- Identify Risk Factors
- Drive Next Steps
- Track Progress Over Time
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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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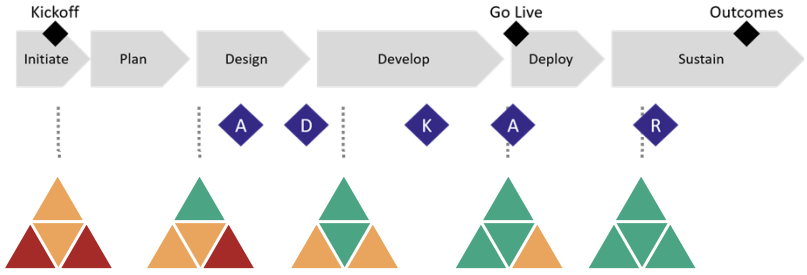
Track Progress Over Time



Assessment Name	Date Created	S	L/S	PM	CM
Initiate	01 Jan	22	21	17	12
Plan	01 Mar	24	26	21	18
Design	01 Apr	27	27	23	21
Develop	01 Jun	29	28	26	24
Deploy	01 Sep	29	29	27	26

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

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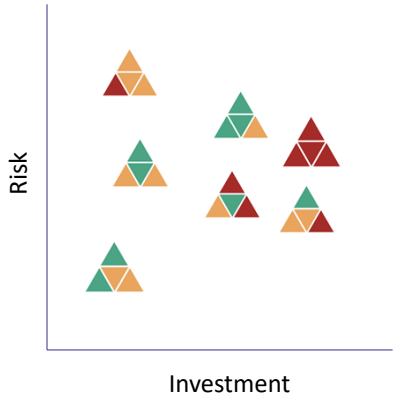
Examine the Portfolio



Projects	S	L/S	PM	CM
Project A				
Project B				
Project C				
Project D				
Project E				
Project F				
Project G				

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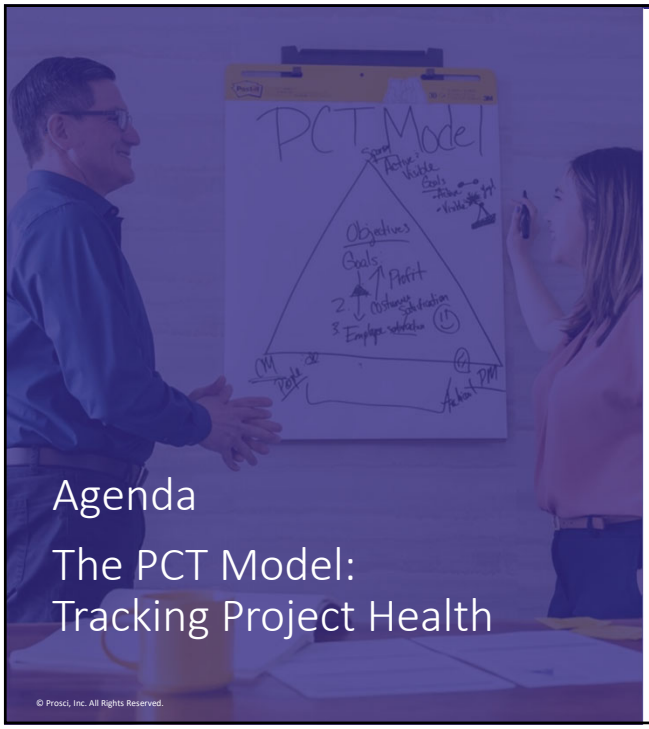

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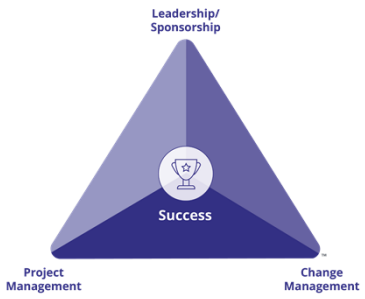

PCT Model

PCT Assessment

PCT Application

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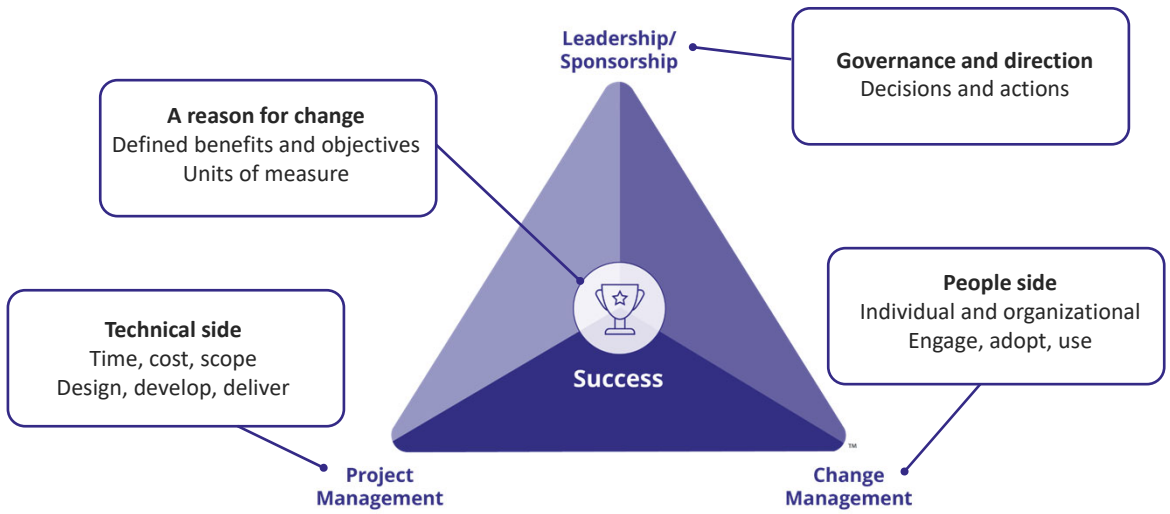
PCT Model: Critical Aspects for Success



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