



# Change Management in Action

Redefining Success Beyond  
the Triple Constraint

Mary Harden

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# Learning Objectives

- Apply the M.O.R.E. mindset to embed adoption, confidence, and value realization checkpoints into existing PMO stage gates.
- Use structured stakeholder confidence mapping to diagnose perception, fatigue, and risk that threaten adoption and sponsorship.
- Redefine project success using adoption- and value-based metrics aligned to enterprise outcomes.
- Establish rapid reassessment cadences that enable leaders to pivot initiatives before momentum and value erode.
- Integrate change complexity into portfolio decision-making to protect workforce capacity and customer experience.





# Agenda

The Adoption  
Gap

Building  
Change  
Capability

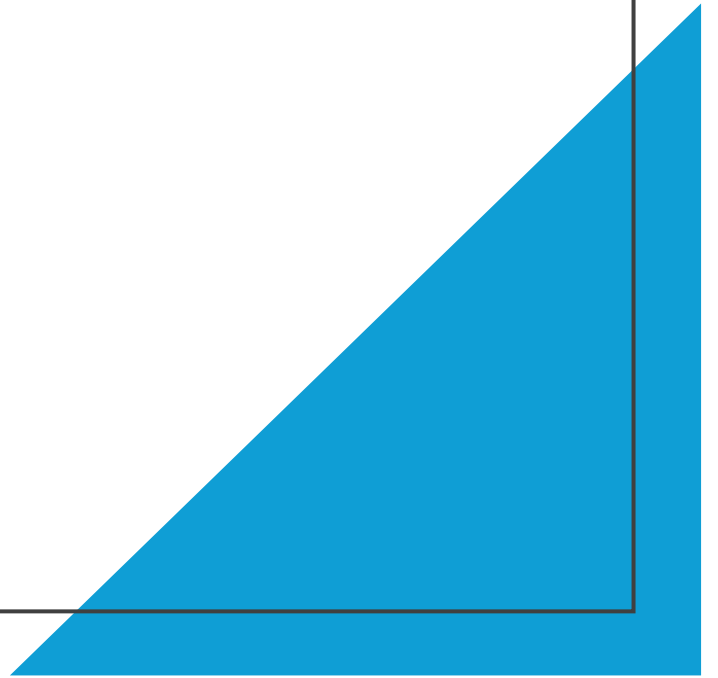
What We  
Learned

Evolving Our  
Approach

Where We're  
Going Next

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We Delivered the  
Project...So Why Didn't  
the Value Follow?

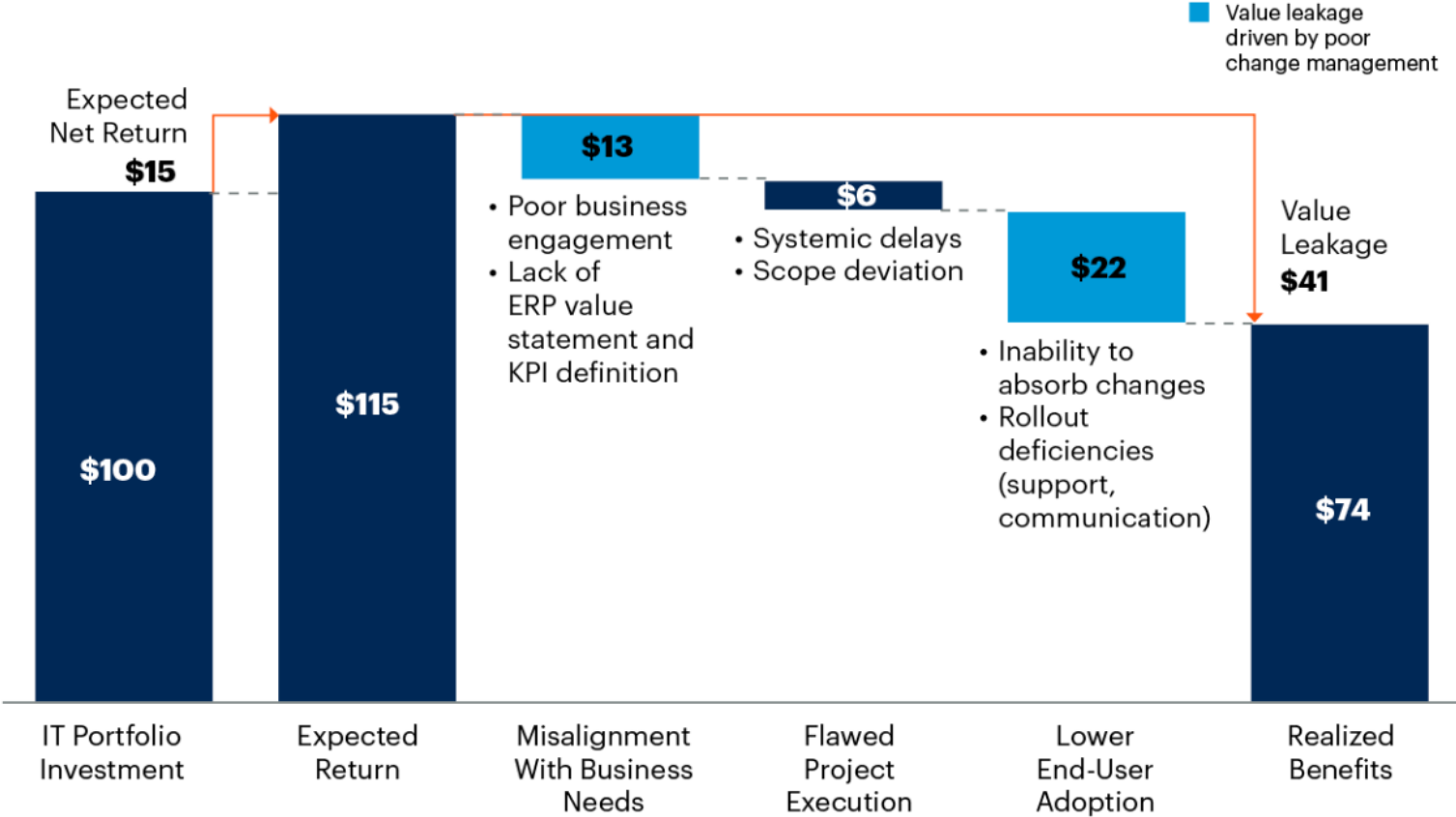


Projects don't create value  
when they launch.

They create value when people  
change how they work.

Adoption—not Delivery—  
determines whether  
projects create value.

# Sources of Value Leakage in IT Implementations



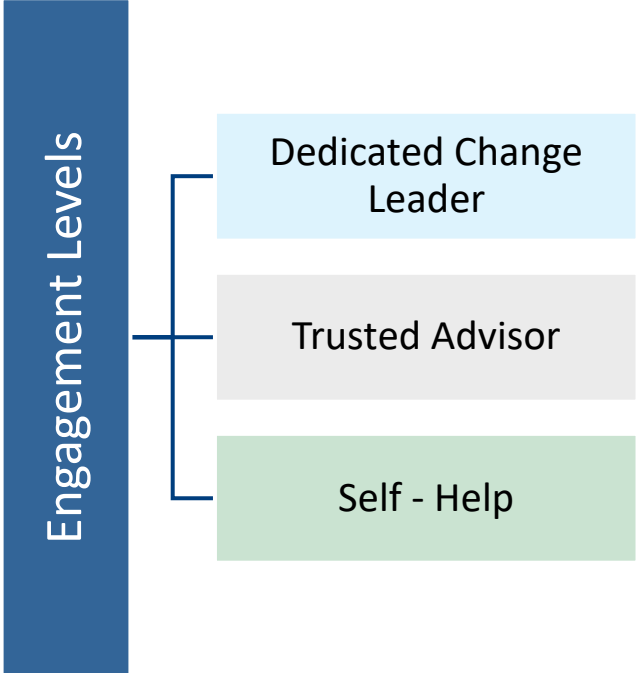
Source: Gartner  
 Note: Dollar amounts in millions  
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# Building a PMO-Led Change Management Center of Excellence

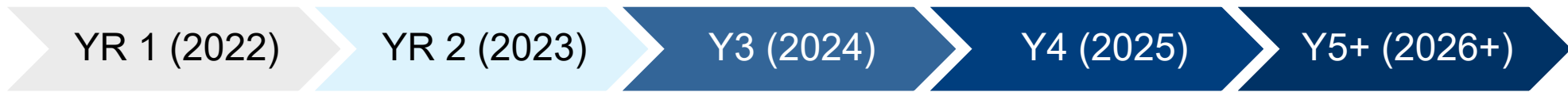
**The PMO as a Change Engine**



The **Change Management Center of Excellence** is a dedicated and separate unit within the ePMO focused on driving effective change management strategies to increase benefits, business value and results when implementing change.



# Change Maturity Blueprint



- YR 1 (2022)**
- No dedicated CM resources
  - Applied CM to some digital transformation change initiatives
  - Developed Product Rollout

- YR 2 (2023)**
- Established CM COE
  - One dedicated CM Advisor
  - Dedicated CM Advisor on some change initiatives
  - Outside consultants

- Y3 (2024)**
- Two dedicated CM Advisors (Prosci certified)
  - Developed CM Playbook, lifecycle, intake process and engagement model
  - Developed Change

- Y4 (2025)**
- Pilot CM playbook on projects
  - Refine tools & templates
  - Develop CM videos, webinars, PM training

- Y5+ (2026+)**
- Build a CM community of practice
  - Continue developing CM resources
  - Continue building change capacity

## Fragmented Change

- Introduced digital enablement tool for some colleagues
- Prepared case for enterprise CM

## PMO-Led CM COE

- Introduced Pulse Checks and Listening sessions
- Established cross-functional collaboration with L&D, Comms

- Developed CM Tools & templates
- Deployed digital enablement tool enterprise-wide

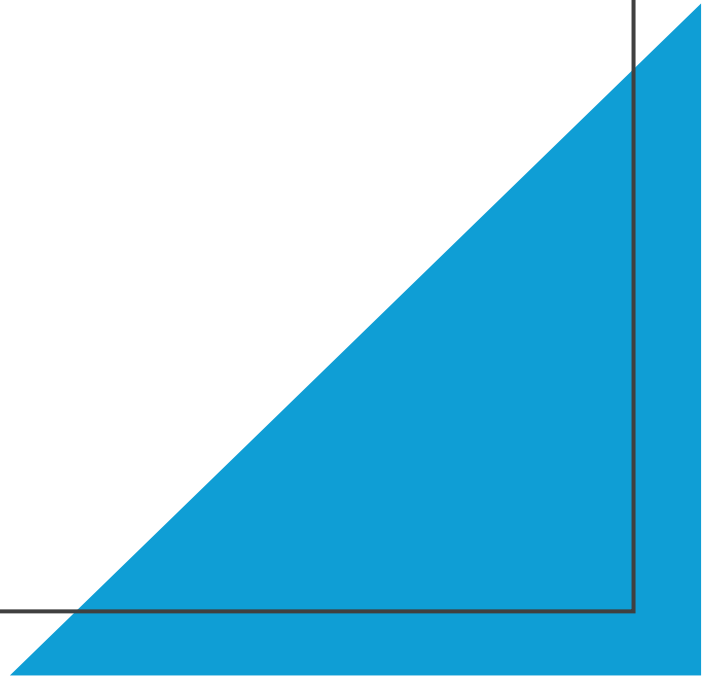
## Repeatable Value

- CM Lunch & Learns series launched by Leadership Coalition BRG
- First time formal change management leveraged for an acquisition

- Organization-wide standards and methods are broadly deployed for managing and leading change

# Driving Value, Not Just Adoption

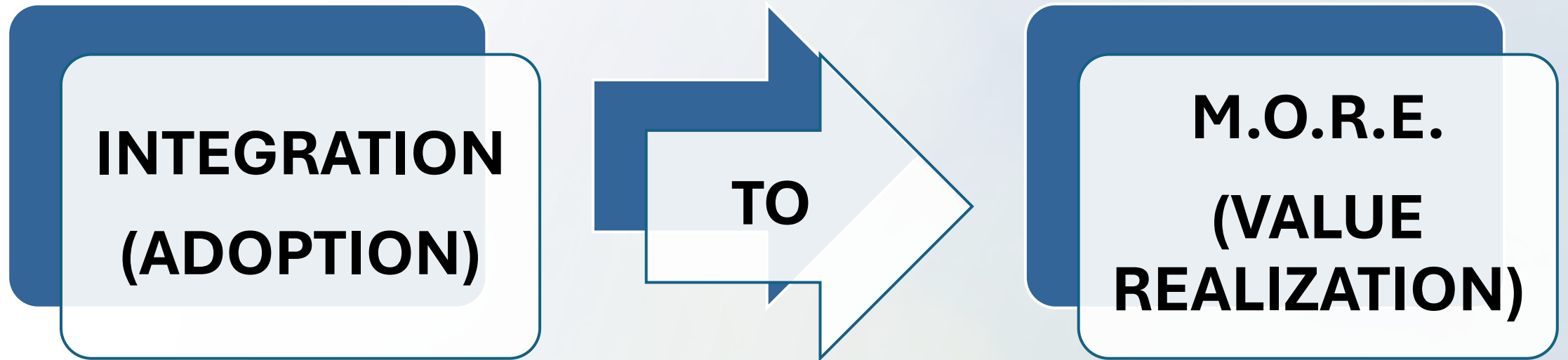
**Evolving Our Approach**



## **Leadership Shift:**

Integration improves adoption.

M.O.R.E. ensures value.



# The M.O.R.E. Value System

How PMOs move beyond the triple constraint



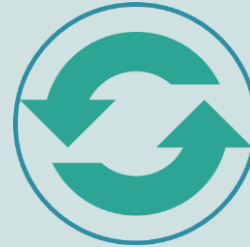
**Manage  
Perceptions**

We Build Confidence



**Own Project  
Success**

We Drive Adoption



**Relentlessly  
Reassess**

We Stay Aligned  
and Readjust



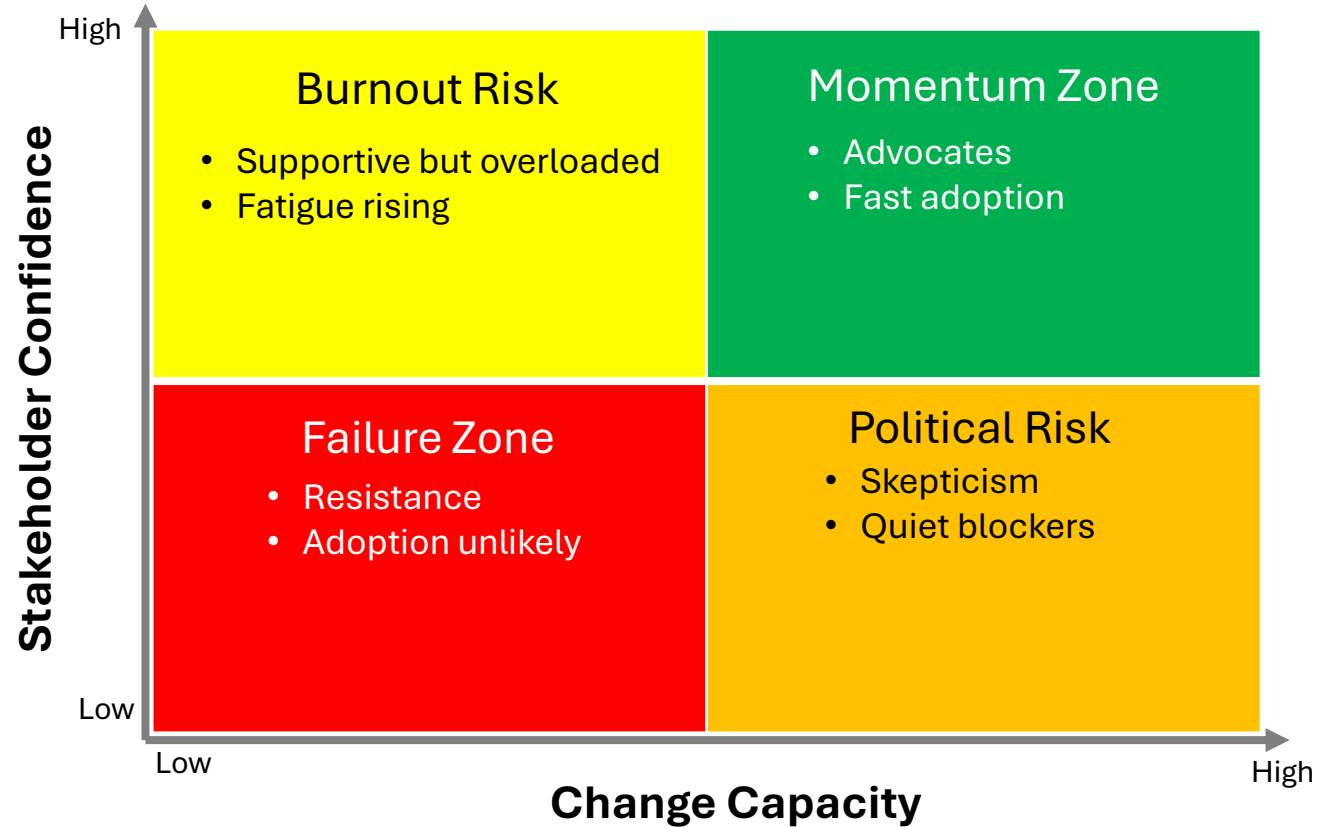
**Expand  
Perspective**

We Protect Capacity



# Manage Perceptions: Where is Your Real Project Risk?

**Stakeholder Confidence Map**



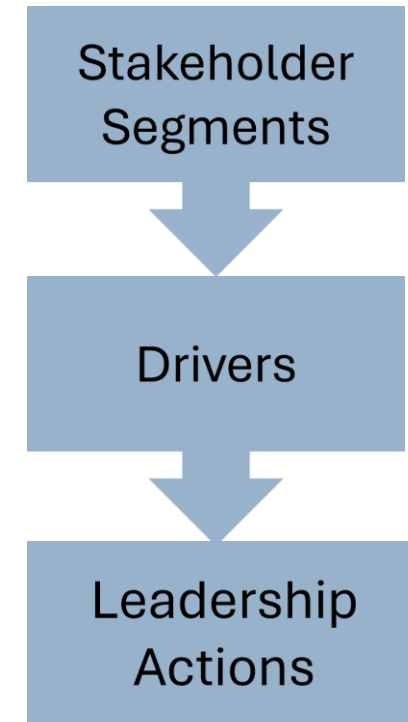
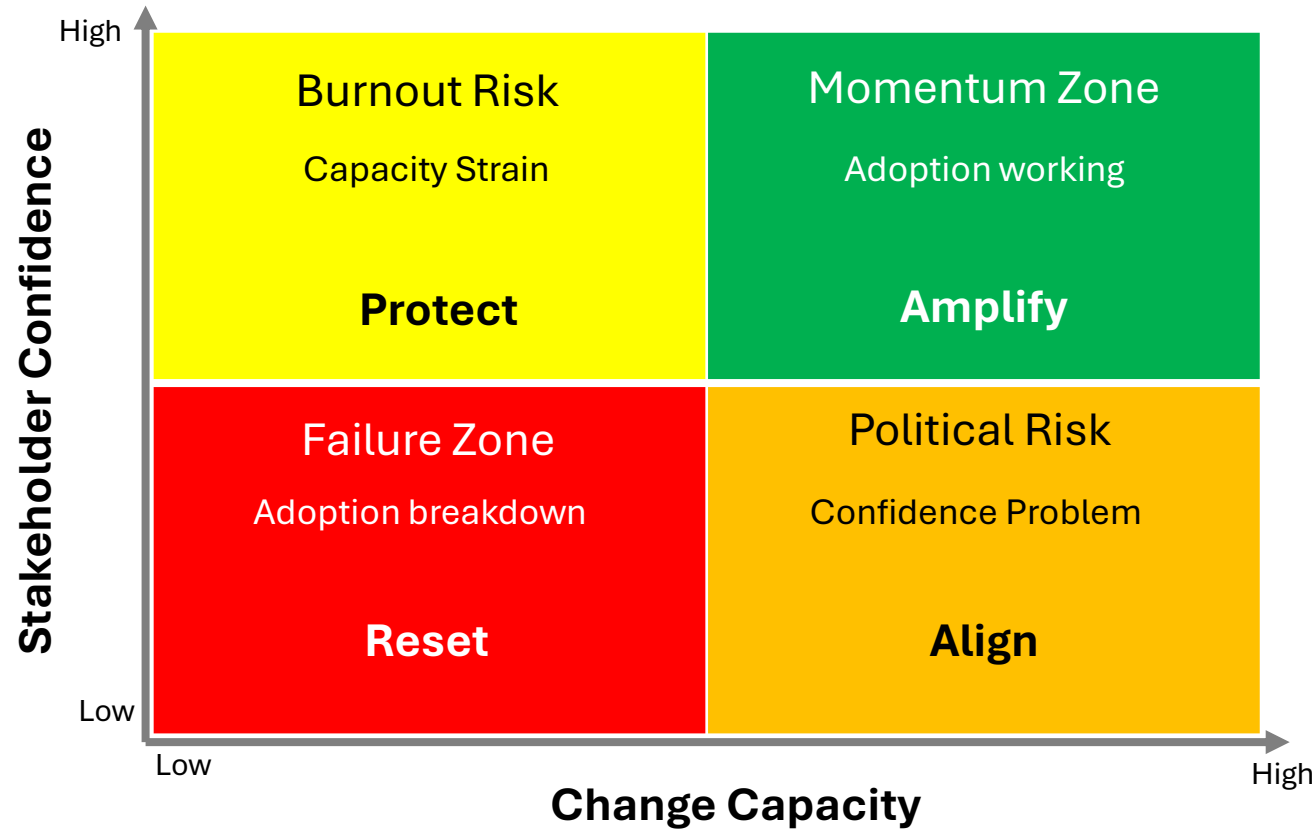
Do they believe in this change and trust it will succeed?

Do they realistically have the bandwidth to absorb it right now?



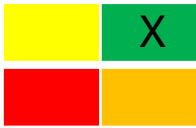


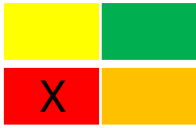
# Manage Perceptions: Leadership Actions

**Stakeholder Confidence Map**



<b>Influence over Outcomes</b>	<b>Stakeholder Segment</b>
Decision Power	Sponsors, steering committee
Operational Power	Directors, frontline leaders
Social Power	Culture carriers, informal influencers
Customer Power	Key customer, partners
Delivery Power	Product, IT, PMO

<b>Driver</b>	<b>What to score (1-5)</b>
Trust	Do they believe leadership can deliver?
Value	Do they see the change as worth the effort and expense?
Advocacy	Will they actively support and reinforce it?
Capacity	Do they have the bandwidth to absorb it now?

	Zone	Leadership Actions
	Momentum	<ul style="list-style-type: none"> <li>• Amplify wins</li> <li>• Equip advocates</li> <li>• Use visible proof points</li> </ul>
	Burnout Risk	<ul style="list-style-type: none"> <li>• Reduce competing demands</li> <li>• Add support</li> </ul>
	Political Risk	<ul style="list-style-type: none"> <li>• Increase sponsor visibility</li> <li>• Sharpen messaging</li> <li>• Address belief gaps</li> </ul>
	Failure Zone	<ul style="list-style-type: none"> <li>• Pause</li> <li>• Reset, or</li> <li>• Redesign before more value is lost</li> </ul>

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**Own Project Success:**  
Redefining “done” as sustained adoption and realized value



**Adoption**



**Value**



# Own Project Success: Adoption Health Check Questions

Reach: Are people using it?

Quality: Are they using it correctly?

Depth: Are they using it fully?

Sustainability: Is it sticking?



## Measuring Adoption Success

<b>REACH</b>	<b>DEPTH</b>	<b>QUALITY</b>
<b>Usage (Baseline Adoption)</b> Are people using it at all?	<b>Depth of Adoption (Meaningful Use)</b> Are they using it the right way?	<b>Quality of Adoption (Right Behaviors)</b> Are they using it effectively and correctly?
<b>Active User Rate:</b> % of target population using the tool/process	<b>Core Feature Utilization:</b> % using critical functionality vs basic use	<b>Error Rate / Exception Rate per User</b>
<b>Login / Access Frequency:</b> daily, weekly active users	<b>End-to-End Process Completion Rate:</b> not just starting, but finishing correctly	<b>First-Time-Right Rate:</b> % of transactions completed without rework
<b>Feature Activation Rate:</b> % who used at least 1 key feature	<b>Manual Workaround Rates:</b> shadow systems, offline tracking	<b>Compliance to Standard Process</b>
<b>Adoption by Role / Segment:</b> lenders vs ops vs managers	<b>Digital vs Legacy Channel Usage Mix</b>	<b>Decision Quality Indicators:</b> if applicable--credit decisions approvals
<b>REACH &amp; SUSTAINABILITY</b>	<b>SUSTAINABILITY</b>	<b>SUSTAINABILITY</b>
<b>Speed to Adoption (Time-Based Metrics)</b> How fast are we getting to value?	<b>Sustainability of Adoption</b> Does adoption stick -- or fade?	<b>Manager Reinforcement (Big Differentiator)</b> Are leaders driving adoption?
<b>Time to First Use:</b> post-training or go-live	<b>Adoption Retention Rate:</b> usage sustained over 30/60/90 days	<b>% of Managers Conducting Reinforcement Activities:</b> 1:1's, coaching
<b>Time to Proficiency:</b> when users operate independently	<b>Drop-off Rate After Initial Use</b>	<b>Frequency of Adoption Discussions in Team Meetings</b>
<b>Adoption Curve Velocity:</b> rate of uptake over time	<b>Reversion to Old Ways:</b> %	<b>Manager Adoption Scorecards Completed</b>
<b>Time to Full Adoption Threshold:</b> 80-90%	<b>Repeat Usage / Habit Formation Indicators</b>	<b>Correlation: Manager Engagement vs Team Adoption</b>



# Own Project Success: Driving Measurable Business Value

Value  
Metrics

Revenue & Growth	Cost & Efficiency	Risk & Compliance
Time-to-Revenue: ↓20%	Cycle Time Reduction: -25%	Compliance Exceptions: -40%
Product Adoption: 88% active users	Employee Time Saved: +6 hrs/week/team	Standardized Process Adoption: 95%
Pipeline Conversion: +12%	Rework Reduction: -30%	Audit Findings: ↓trending
Customer Impact	Workforce Adoption (Leading Indicators)	Value Realization Tracker
CSAT: +10 pts	Active Usage: 92%	Value Leakage (Expected vs Realized Benefits)
Turnaround time: -18%	Manager Reinforcement: 85%	Expected Value: \$12M
Complaints: -22%	Employee Confidence: improving trend ↑	Realized Value: \$10.5 M
		Gap Closed: +15% YoY

Data Sources: Adoption analytics, employee surveys, operational KPIs, customer metrics

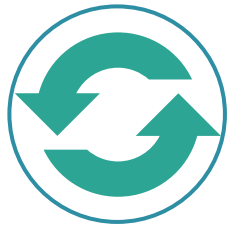


## Relentlessly Reassess to Protect Value



In a constant-change environment, the most successful leaders aren't the ones who plan best –

They're the ones who **reassess and adjust the fastest.**



# Relentlessly Reassess The Change Management Paradox

## The Plan (On Paper)



## The Reality (In Practice)





## Reassessment in Action:

Reassessment isn't about redoing the plan.  
It's about paying attention to four signals:



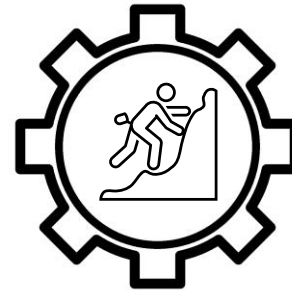
### Confidence

Do leaders still believe in it?



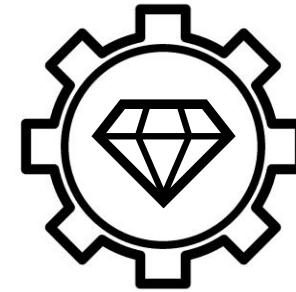
### Capacity

Can teams still absorb it?



### Adoption

Are people actually changing behaviors?

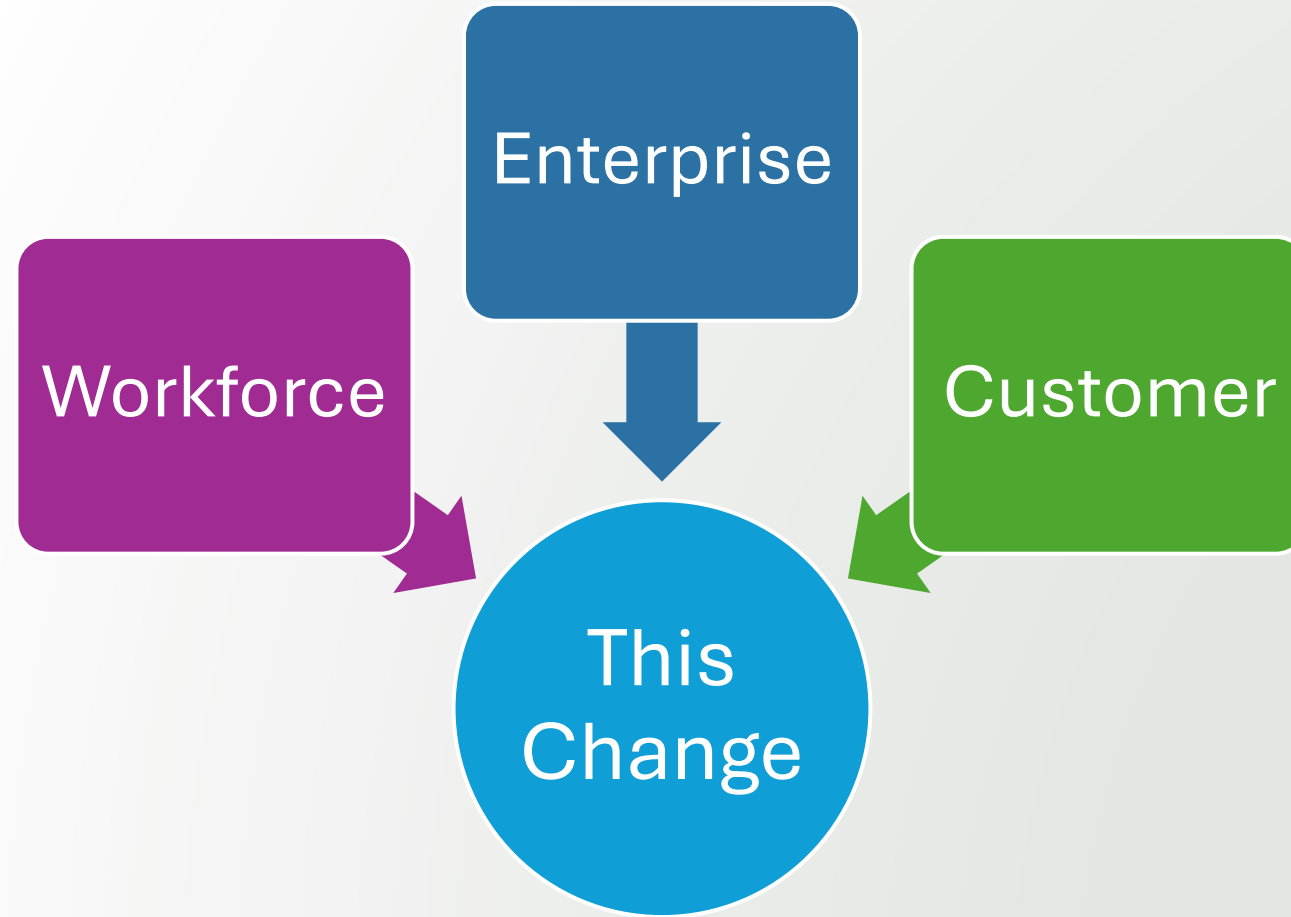


### Value

Are we seeing the results we expected?



# Expand Perspective – Protect Capacity





# Change Complexity as a core portfolio decision lens perspective

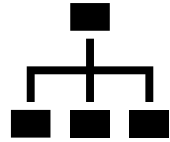


**Change Magnitude**

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*Weight or degree of the change*

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**Organizational Complexity**

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*Who's impacted and how?*

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**Stakeholder Engagement**

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*Effort to engage and align*

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**Adoption Support**

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*Capacity building*

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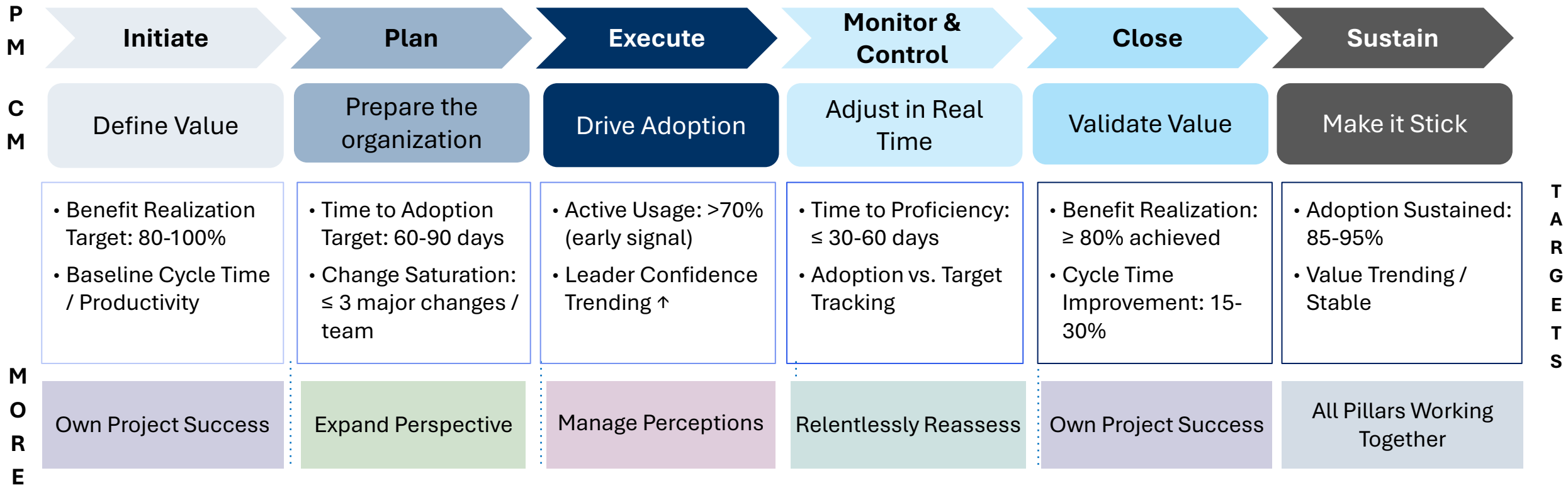
**External Customer Impact**

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*Will it impact our customers?*

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# M.O.R.E. in Action: From Project Delivery to Value Realization



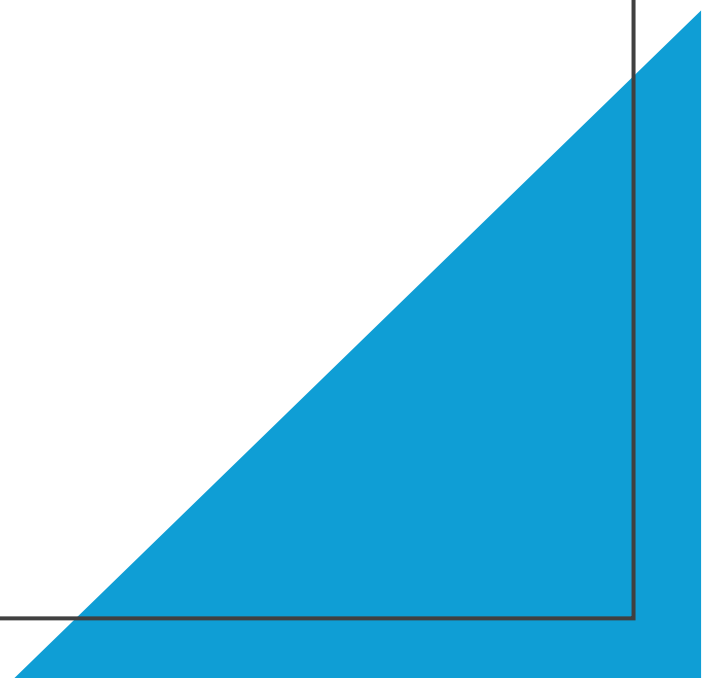
## **Poll:**

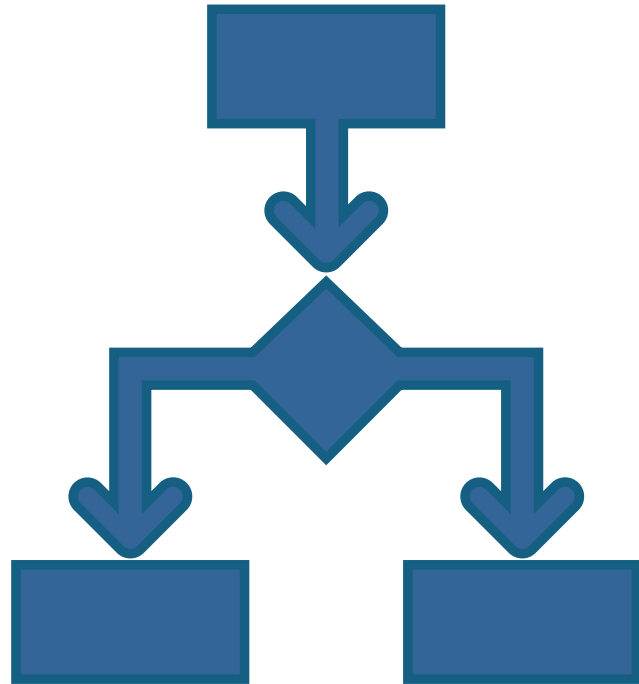
**What's the first thing you'll do differently to adopt a M.O.R.E. mindset?**

- A. Map stakeholder confidence before jumping into execution
- B. Define how we'll measure adoption and value—not just delivery
- C. Build in a regular “pause and reassess” cadence
- D. Look beyond my project to understand broader business impact

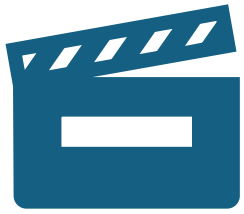
# Beyond the Triple Constraint

**Changing How We Think About Success**





Projects launch.  
People adopt.  
Value happens.



# Apply M.O.R.E. Starting Today

## 1. Start measuring what matters: Adoption & Value

- Define 2-3 adoption metrics
- Align to 1-2 business value outcomes
- Track beyond go-live and not just at close

## 2. Map Stakeholder Confidence & Capacity Early

- Use Confidence x Capacity map
- Identify where leaders are
- Take targeted actions per quadrant

## 3. Build in a Rapid Reassessment Cadence

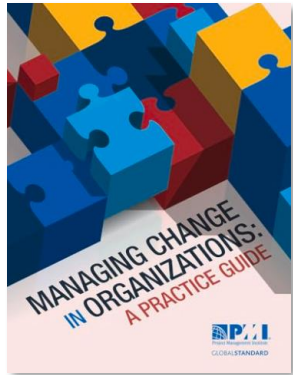
- Establish a simple cadence (bi/weekly/monthly)
- Review signals: confidence, capacity, adoption, value
- Adjust course quickly

## 4. Expand the Definition of “Done”

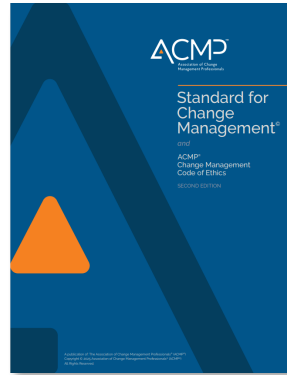
- Extend beyond delivery
- Assign ownership for sustainment
- Embed into PMO governance



# Resources:



PMI Practice Guide



ACMP Standard for Change Management

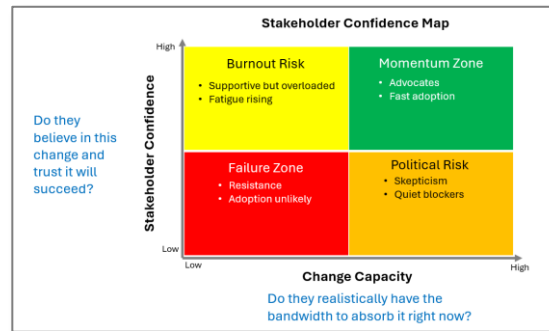
The screenshot shows the 'Change Success Metrics Idea Generator' interface. It includes a form to input project details and a summary of three key human factors: Speed of Adoption, Ultimate Utilization, and Proficiency. The summary shows that 75% of impacted groups are actively using the CRM system within 1 week(s) of implementation, 90% are actively using it within 5 week(s), and 75% are proficient within 8 week(s).

[Link to Prosci Change Success Metrics Idea Generator](#)

# Tools:

CHANGE COMPLEXITY ASSESSMENT (CCA)								
Project Number & Name								
Project Description	Select a score in the "Scores" column, based on the rating (level 1-5) that best describes your change initiative for each element.							
Instructions								
Element	Definition	1	2	3	4	5	Score	Rationale / Comments
Change Magnitude	How much or complex the change is in terms of project scope, strategic impact or cost of the organization.	Low Magnitude: Small changes to business processes, systems, or policies.	Medium Magnitude: Medium changes to business processes, systems, or policies.	High Magnitude: Large changes to business processes, systems, or policies.	Very High Magnitude: Significant changes to business processes, systems, or policies.	High Magnitude: Significant changes to business processes, systems, or policies.		
Organizational Complexity	How far the change extends across teams, business divisions, and the nature of the impact on core business activities.	Low Complexity: Low number of impacted individuals. Low volume in change impact across impacted organizations.	Medium Complexity: Medium number of impacted individuals. Medium volume in change impact across impacted organizations.	High Complexity: High number of impacted individuals. High volume in change impact across impacted organizations.	Very High Complexity: Very high number of impacted individuals. Very high volume in change impact across impacted organizations.	High Complexity: High number of impacted individuals. High volume in change impact across impacted organizations.		
Stakeholder Engagement Effort	The level of effort needed to engage people, resources, and change agents for the success of the change.	Low Effort: Minimal effort required to engage people, resources, and change agents for the success of the change.	Medium Effort: Moderate effort required to engage people, resources, and change agents for the success of the change.	High Effort: Significant effort required to engage people, resources, and change agents for the success of the change.	Very High Effort: Very significant effort required to engage people, resources, and change agents for the success of the change.	High Effort: Significant effort required to engage people, resources, and change agents for the success of the change.		
Adoption Support	The level of training and education required to ensure stakeholders are able to manage the change, its processes, or ways of working in support of the new environment.	Low Support: Minimal training and education required to ensure stakeholders are able to manage the change, its processes, or ways of working in support of the new environment.	Medium Support: Moderate training and education required to ensure stakeholders are able to manage the change, its processes, or ways of working in support of the new environment.	High Support: Significant training and education required to ensure stakeholders are able to manage the change, its processes, or ways of working in support of the new environment.	Very High Support: Very significant training and education required to ensure stakeholders are able to manage the change, its processes, or ways of working in support of the new environment.	High Support: Significant training and education required to ensure stakeholders are able to manage the change, its processes, or ways of working in support of the new environment.		
External Customer Impact	The level of impact and visibility of the change to external stakeholders and the level of customer support and relationship management required to ensure the success of the change.	Low Impact: Minimal external customer impact. Low level of customer support and relationship management required to ensure the success of the change.	Medium Impact: Moderate external customer impact. Moderate level of customer support and relationship management required to ensure the success of the change.	High Impact: Significant external customer impact. Significant level of customer support and relationship management required to ensure the success of the change.	Very High Impact: Very significant external customer impact. Very high level of customer support and relationship management required to ensure the success of the change.	High Impact: Significant external customer impact. Significant level of customer support and relationship management required to ensure the success of the change.		
<b>Total</b>							<b>6</b>	

Change Complexity Assessment



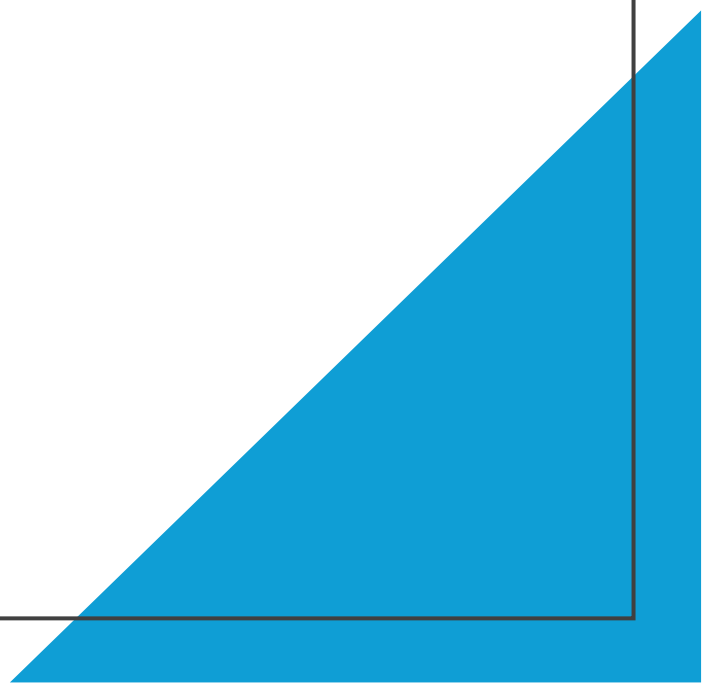
Stakeholder Confidence Map

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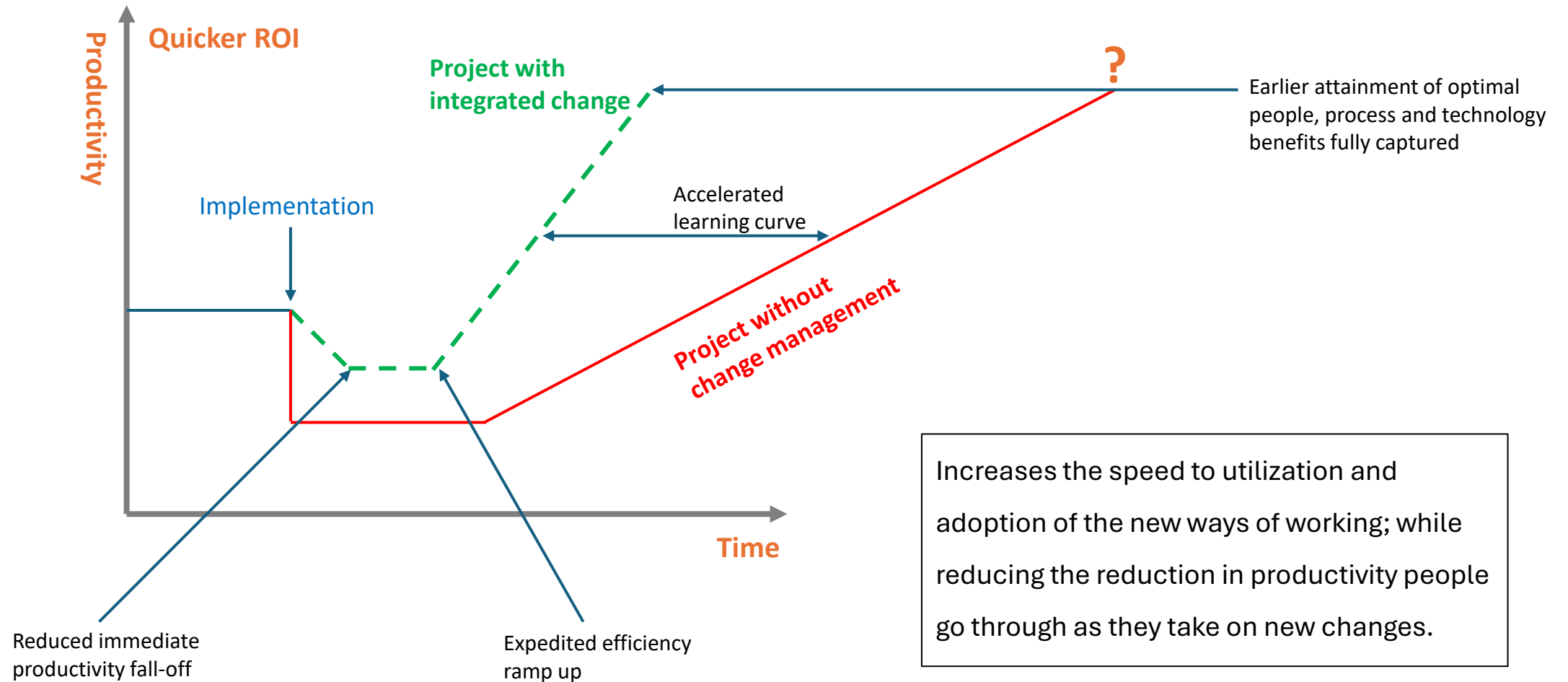
Change Management Success Metrics Template

Questions?

# Appendix

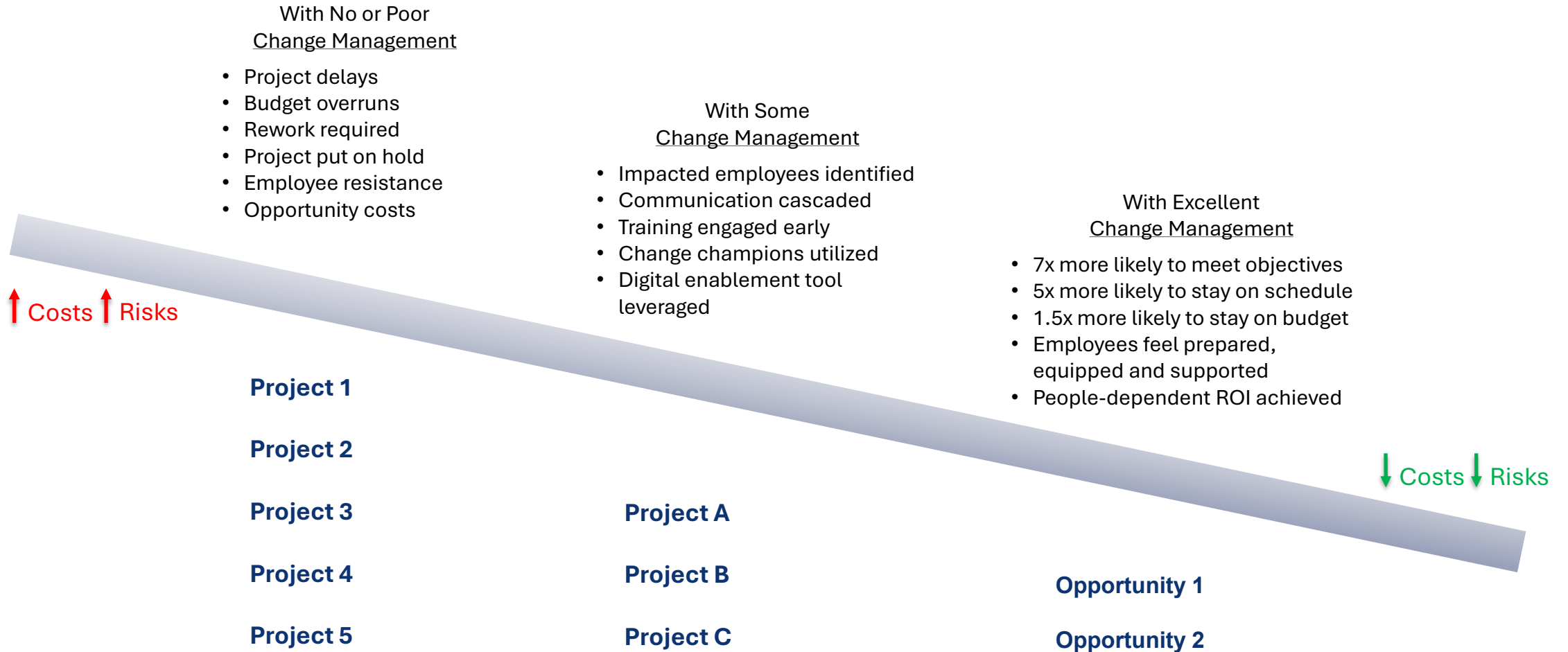


# The Value of Change Management

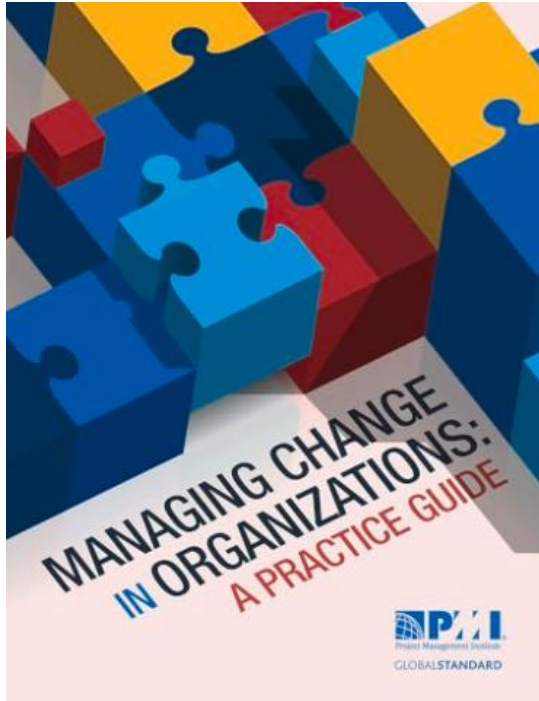


# Improving Project Outcomes

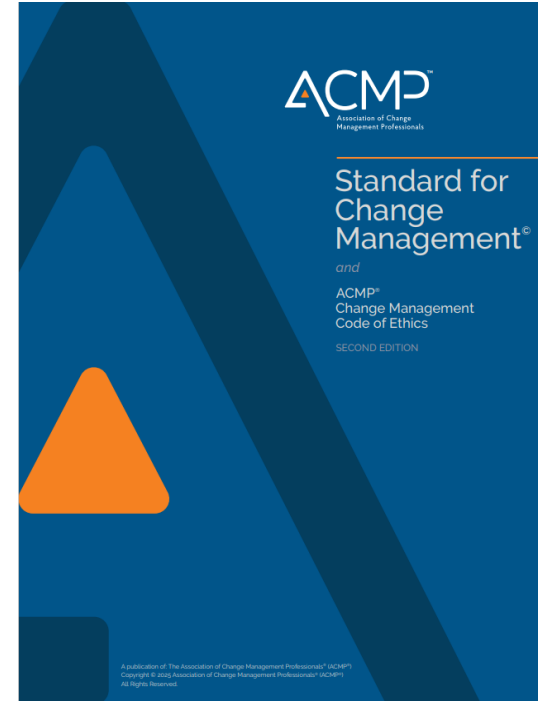
The costs and risks of mismanaging change by ignoring the people side of change can be significant



## What is Change Management?



**PMI** - Change management is a comprehensive, cyclic, and structured approach for transitioning individuals, groups, and organizations from a current state to a future state with intended business benefits.



**ACMP\*** – The practice of applying a structured approach to the transition of an organization from a current state to achieve expected benefits.

\*ACMP: Association of Change Management Professionals