Change Management

Module 8

8-1

Instructor Notes

This module refers to pages 51-54 in the Learning Log.

Objective of This Activity

Using the new change request, ask the teams to document the process they would use to analyze this change as well as any others. The first step would be to log this change in the change log. This exercise should not take more than 15 minutes.

If the class is behind schedule, this activity could be accomplished through a facilitated discussion. A good question for each team is to ask them if they have a change control process.

Module 8 Timing

This module lasts for 50 minutes, 9:10-10:00, on day 3. The agenda is:

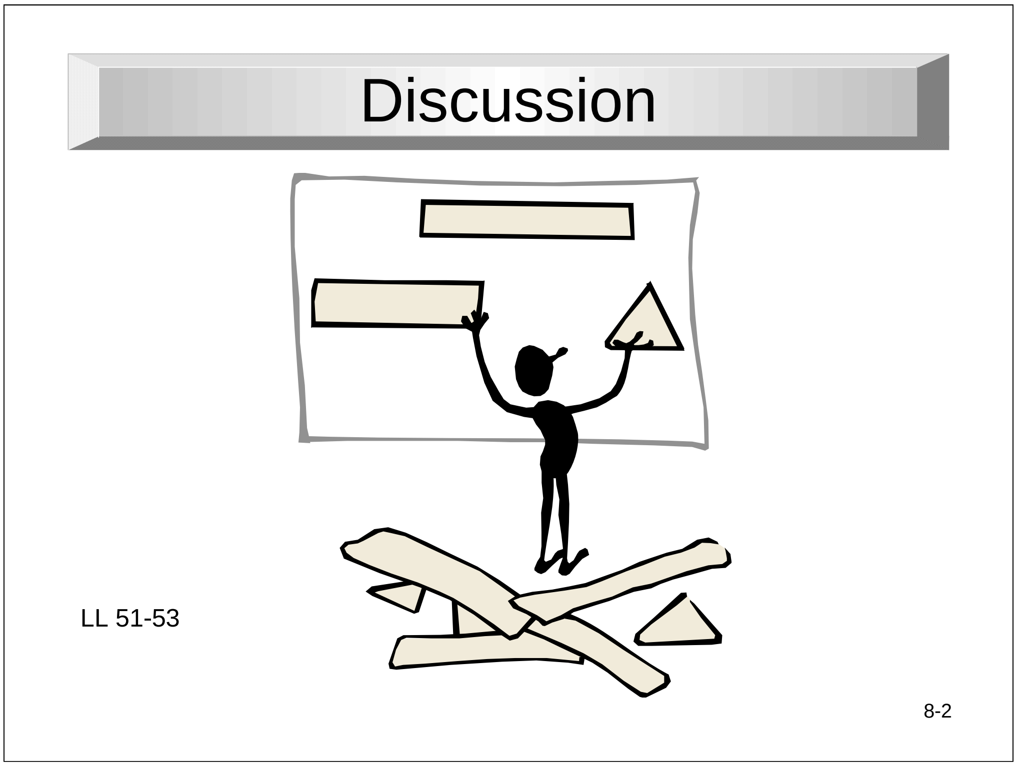
Start	End	Length	Subject
9:10	9:30	20	Discussion
9:30	9:45	15	Change Management Activity
9:45	10:00	15	Debrief and PM Feedback

Summary of Documents

Case Study 8-1: The memo from Perry Fields, Subject: Change Request #97.

Documents in Previous Modules That Teams Should Use

WBS, Estimate, Schedule



The objectives from Project Management Orientation were:
•Listing the required baselines for managing a project
•Describing change management
•Discussing why change management is important in project management
•Describing what should be included in the change management process
•Identifying types of changes
•Describing the typical follow-up actions to change requests
•Listing the elements of a change request form
•Discussing the project manager's role in change management

Facilitate a discussion covering topics such as:
•Learning objectives for the module
•Answer questions the participants have about PM Orientation
•Why does a PM do this?
•Personal experiences
•What happens when you implement change control?
•What happens when you do not implement change control?
•What baselines are required to manage a project?
•What is the PM's role in change management?
•What will you do differently when you go back to work?
•Analyzing the impact of a change request on all Seven Keys

Think of all the bad things that can happen to a project if changes are not managed. And then think of how the Seven Keys will be negatively impacted. Scope will be unknown. Work will not be completed on time and on budget. Team members will not know what they are supposed to be doing. New risks will arise and existing risks will become more severe. And finally, stakeholders will be surprised when the deliverables do not match their expectations.

When analyzing each change request, determine how the change will impact each of the Seven Keys.

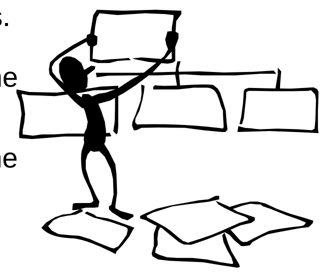
Change Request Activity

Purpose: Practice handling a change request

Process:

1. Read Change Request #97 from Perry Fields. The customer is requesting a change.
2. Identify the steps you would take to handle the change request

   Hint: The first step is logging the change in the change log.



Participation: Teams led by Project Manager

Product: Steps (flow chart) of how you handle the change request.

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Objective of This Activity

Using the new change request, ask the teams to document the process they would use to analyze this change as well as any others. The first step would be to log this change in the change log. This exercise should not take more than 15 minutes. If the class is behind schedule, this activity could be accomplished through a facilitated discussion. A good question for each team is to ask them if they have a change control process.

Set-up Activity

You have just received Change Request #97, a memo from Perry Fields. The customer is requesting a change. How are you going to handle it? Document each of the steps you would take. *Hint:* The first step is logging the change in the change log.

Give the students 15 minutes to complete the case study.

Summary of Documents

Case Study 8-1: The memo from Perry Fields, Subject: Change Request #97.

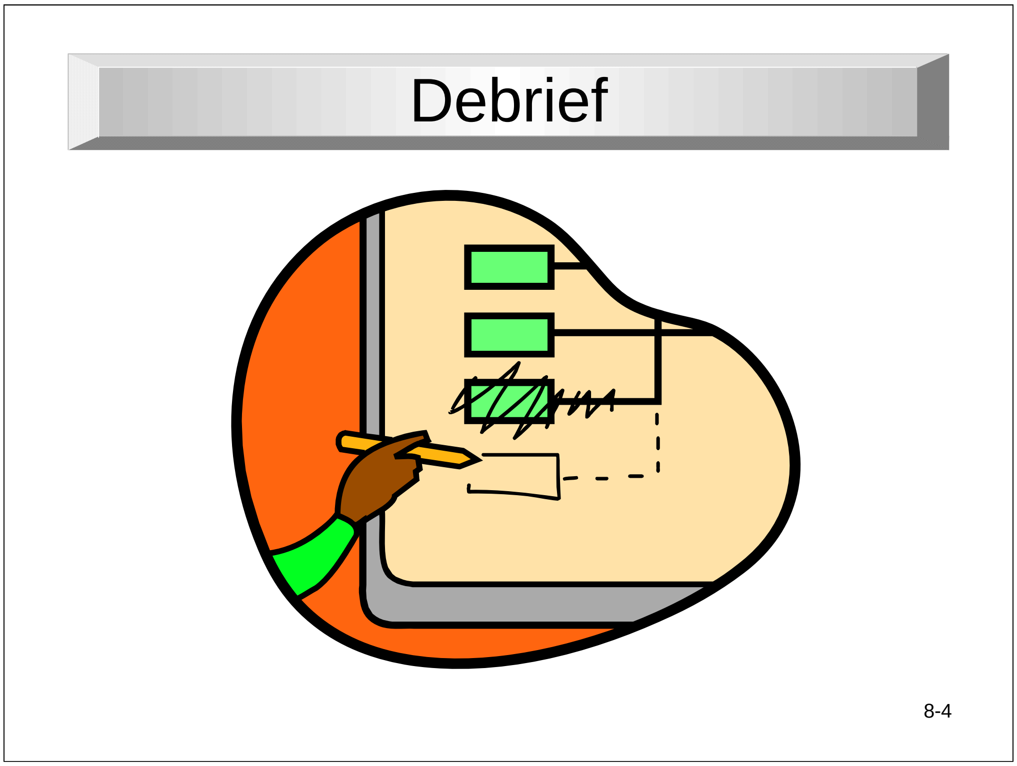
Documents in Previous Modules That Teams Should Use

WBS, Estimate, Schedule

During Team Presentations

Ask the teams to present their solutions. Each team's list should include items such as:

1. Log the change in the change log
2. Investigate the impact of the change on the WBS, the risk plan, the estimate, and the schedule
3. Document the impact of the change on the schedule, the cost, and the risk of the project
4. Submit the results of the investigation to the approvers according to the change request process
5. If approved, update the documentation
6. Begin implementing the change



Debrief the activity by facilitating a discussion covering topics such as:

•What happened during the activity?

•Did you use a change management process?

•What made the activity difficult or easy to do?

•What do you need to have before implementing a change control process?

•Would you be able to do this on your projects?

•Who does this on your project today (PM, team leaders, staff, sponsor, …)?

•Would doing this be useful on your projects?

•Could you apply this process on your own projects?

Seven Keys Assessment

Purpose: Practice reviewing the health of the project using the Seven Keys

Process: See the diagram.
- Record status
- Think about issues & actions

Participation: Teams led by Project Manager

Product: Status, issues, and actions for Work & Schedule, Risk, Scope, Stakeholders, Business Benefits, and Team

Time allowed 5 Minutes

Seven Keys Assessment Worksheet

- Red - Urgent - Corrective action required immediately.
- Yellow - Warning - corrective action required in the near term.
- Green - Stay the Course - no corrective action required.

Project Name: Interviewee: Date: Interviewer:

Key and Criteria	Noted Issues	Heads Up Display	Proposed Actions
Stakeholders are Committed	➢	Red Yellow Green	➢
Business Benefits are Being Realized	➢	Red Yellow Green	➢
Work and Schedule are Predictable	➢	Red Yellow Green	➢
Scope is Realistic and Managed	➢	Red Yellow Green	➢
Team is High Performing	➢	Red Yellow Green	➢
Risks are Being Mitigated	➢	Red Yellow Green	➢
Delivery Organization Benefits are Being Realized	➢	Red Yellow Green	➢

8-5

There should already be a flip chart for each team capturing the health of the project from the previous module. Get the teams to update the flip for Module 7 based on their current knowledge of the Case Study project.

Get the teams to think about:

- The status (Green, Amber, Red)
- The issues behind any Yellow or Red keys
- What actions they could propose to resolve the issues

Ask one team to present back and then invite other groups to contribute if they have any major differences. Make a note of which team has presented back since another team should present back in the next module.

Pay particular attention to the Work and Schedule, Risk, Scope, Stakeholders, Business Benefits and Team keys since these are the main ones being addressed in this module.

PM Feedback

After the case study exercise:

- The PM describes what went well
- The team describes what went well
- The PM describes what could have been better
- The team describes what could have been better
- Hand the feedback forms to the PM

- After providing the PM feedback. Document your lessons learned on page 54 of the Learning Log.
  – This should include any changes that you plan to make in your daily work as a result of this exercise.

8-6

After teams have presented their results, give them a few minutes to provide feedback to the participant who acted as the PM for the activity.