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Helping Project “Customers” Embrace Change

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By Jonathan Weinstein, PMP

The fundamental nature of projects is to design and implement change. Projects in a government environment often focus on the processes and practices of managing projects, but sometimes overlook a critical success factor—their customer’s perspective on the changes that a project will bring to their environment.

To follow a successful approach to change from the customers’ perspective, project managers and teams must possess the following customer-oriented capabilities.

1. Accurately assess the full scope of change for each unique customer situation.

The burden falls on the project team to understand the customer’s current processes as well as—or better—than the customer. The team must also rapidly gain an appreciation of who the participants in the customer’s process are, how their roles may be changing, and how that change is perceived.

The implication is that the project manager and team members must have the skills and tools to perform a “readiness assessment” on the customer organization, to perform business and process analysis to uncover requirements that may not be stated by the customer, and to gauge the customer’s capabilities and culture in order to determine how to engage them as a partner.

2. Prepare the customer for the change (without scaring them).

Remember, a customer organization may have little to no experience in undergoing a major, organization-wide change. It is essential for the team to understand the change process and all the dynamics associated with it.

A skill required for success in managing change is the ability to lead and guide the customer through the change process, taking care to share the appropriate information—when it becomes relevant and useful to them. Guiding the customer through the process with the right information at the right time lays the foundation for a successful transition to the new environment and adoption of new processes or practices. By contrast, even if you were to tell a customer at the outset of a project everything they could expect, they wouldn’t remember it, and presenting extensive details before they become relevant could overwhelm the customer.

3. Effectively engage the customer and manage their expectations throughout the change process.

Too often service organizations fail to effectively engage their customers, and as a result become nothing more than “vendors” in the customer’s eyes. Project managers can avoid falling in to this trap by establishing a clear and effective methodology for working with customers from the outset of a relationship. The preferred methodology integrates the technical and organizational elements of change and is highly collaborative. Methodologies of this type often include agreements about what services will be provided, and determining who will do what, during and after implementation, is clearly defined. As experts in project management and change, the project manager and project team members are responsible for introducing the customer to the methodology and leading its execution, and holding themselves and the customer accountable for performing the agreed-upon tasks.

4. Instill confidence in the customer by executing the implementation with a high degree of competence and professionalism.

Customers gain confidence when they see that the transition to a new environment is being planned and executed effectively. When the inevitable issues arise, customers are comforted when the project manager and project team approaches and resolves them in a calm, assured manner. The ability for the any project team to perform at this level will be a function of superior skills in the areas of: facilitation, requirements gathering/analysis, project management, change management and managing difficult

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people and situations.

As you develop the above externally-oriented capabilities, take care not to overlook internal capabilities. Project managers and project teams can further build a customer's trust by keeping an eye toward constant process improvement to ensure operational efficiencies. One useful method is to derive lessons learned: create a meaningful plan of action from an analysis of the type of changes that have occurred in previous projects, and their impact on customers. Translate these lessons into a "road map" to improve processes, customer communications, and management of customer expectations.

The challenge to project teams is the pressure to execute each of these actions flawlessly—or risk becoming the scapegoat for missed project expectations.

About the Editors

Timothy Jaques, PMP, and Jonathan Weinstein, PMP, are founding partners of Line of Sight (www.line-of-sight.com), a project management, process design, and organizational change management services organization. They work with both the government and private sectors and have written extensively on project management and organizational change.

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