

news from CITI – partner in change



# pulling in the same direction

Managing  
change  
effectively

**D**espite the good intent at the start of most projects, the weak link continues to be the point at which 'the business' has to take on and run with the consequences of the project's work.

A failure to secure the intended benefits, despite delivering to time, cost and quality, plagues too many important projects. These failures continue despite the multitude of 'change management' methods followed by organisations, often at the behest of the HR function.

CITI has recognised that traditional project management alone is no longer sufficient to deliver successful outcomes. Nor is the answer to have 'change management' as a separate stream of activity, often falling out of step with the project it is intended to support.

Instead, our research tells us that change

by **Simon Peach**

**Change Expert: CITI**

needs to be managed from start to finish: from the first inkling that change is needed through to the point at which it is having its intended impact in the live business. Complex change will always need projects to deliver the new capability or systems or whatever else is required to enable the change on the ground. But these projects are now seen as part of the change cycle, not the whole endeavour.

**The new CITI approach to change sets out practical ways to manage change across three dimensions:**

- **making the change wanted:** translating the imperative to change into terms that genuinely resonate with those who will have to make it work, ensuring the change will run with, rather than against, the grain of the organisation – this dimension of change must be driven from start to finish by the leaders within the business

- **making the change happen:** enabling those receiving the change to do so successfully whilst delivering the new capability; a thorough understanding of the impact of change ensures that all the right measures are made to happen, usually through one or more projects sponsored by the leaders within the business
- **making the change stick:** ensuring that the change has been adopted and is having the intended impact, making adjustments and perhaps sponsoring new projects to correct a potential failure to sustain the impact – giving the leaders within the business a set of practical methods to monitor and reward success.

Bringing together the management of change and projects with clear roles and responsibilities and a focus on leadership at all stages raises the odds of a successful outcome. Project management alone is no longer sufficient. Managing change from start to finish is the new challenge.



# targeted success

The key to success was immersing in short best practice workshops

**L**egal & General plc (L&G) have engaged CITI many times over the years in a number of their businesses to provide project, corporate portfolio and programme management education and consultancy.

Legal & General Group (a FTSE 100 company) are one of the best known and respected financial services companies in the UK. They are a leading provider of risk, savings and investment management products, with nearly seven million customers worldwide.

In response to a rapidly changing business environment in their Individual Protection business, they needed to improve their capability to deliver change. We were asked to outline an approach to assess their current change capability, benchmark

this against similar organisations, and design a targeted development programme that didn't impact current priorities of the business.

## raising our game

"The classic training model, taking individuals out of the business to sit in a classroom for a week at a time, was not going to work for us," says Jane Logie, Technology & Business Change Director, "but at the same time, we knew we needed to raise our game in managing change." This is a current business issue for many of our clients – the need to develop capability, without the capacity to take large numbers of the change community 'off-line' to attend training courses.

"CITI were a good choice for us," continues Jane. "Having worked with them before, we knew they were able to deliver high-quality support coupled with leading-edge advice and people. The main attractions of their approach have been the quality of the benchmark data used in assessing our current capability – allowing for extremely

targeted development – and the way in which the development has been delivered in line with business pressures."

## targeted development

The key to success was indeed the way in which the development programme was designed and delivered specifically to suit L&G's environment. Once the profiling element was completed – evidencing strengths and areas for development – project managers were immersed in short best practice workshops with CITI experts. Delivered over a period of months, these workshops targeted the areas identified for development. After each workshop, individuals were given the opportunity to apply the best practice in their live project environment through supported work-based assignments. A hugely successful approach, it effectively accelerated the learning by embedding it with delivery. At the same time, it did not increase the risk to any project because these new ways of working were supported with CITI coaching.

by **Jane Logie**, Technology & Business Change Director: Legal and General, & **Nick Dobson**, Change Expert: CITI

Reflecting on the engagement to date, Jane says: "This approach was far more useful than a week in a classroom. It gave our project managers the opportunity to experience best practice in action, and didn't distract them from our ongoing business and change agenda," adding: "And I have to say, your people are brilliant." Nick Dobson, our Lead Change Expert for the programme, says "this has been a very rewarding and interesting engagement with L&G; together we were able to explore new ways of meeting today's challenges and were hugely successful in our pursuit." The unique approach is being successfully implemented in other parts of the business and we continue to work with Jane's area to meet the needs of a challenging business environment.

## CITI's Centres of Excellence Club

The twenty-second meeting of CITI's Centres of Excellence Club (CofEe Club) was held at Aviva in their York offices, pleasantly positioned by the Ouse river with stunning views of York Minster.

The topic for the day was change management, with members addressing two key challenges: an organisation's readiness to change and the challenge of making the change stick. Thomas Docker, CofEe

Club Chairman, completed the general introductions before handing over to our host Barbara Hoggard, Project and Operations Practice Lead, Aviva, who provided an insight into the Aviva brand and their commitment to putting customers, the environment and the community at the heart of their business.

### focusing on enlightenment

Setting the scene as our first case study, Mark Whitby, UK IT Business Operations Director, Aviva, shared what are the dimensions of change in Aviva. He provided some fascinating thoughts into what makes change work and where Aviva are still learning. Aviva's biggest change programme success was discussed and the elements that made it 'probably the best rebrand in history' (quoted in the national newspapers) were attributed to the change team's committed focus on enlightening and engaging the organisation in the changes that needed to occur.

CofEe Club members then moved into the first workshop, where members were asked to complete a leadership-style questionnaire. During the feedback on styles (authoritarian, participative and delegative), it was observed that the members all had participative as the dominant leadership style, with delegative as the second style. This may reflect modern business practices or could reflect some form of conditioning we have all undergone over the last few years.

CITI then opened up the next debate with a thought-provoking presentation from Hilary Small, Principal Consultant, CITI, on key aspects of change management. Hilary introduced a number of models and approaches to implementing change that members were invited to challenge. This led members into the second workshop where they each analysed their organisation's readiness for change.

### thinking differently

Toni Frascina, Business Improvement Manager, and Nicola Haywood-Alexander, Head of Business Improvement at Sheffield Hallam University, shared their wealth of experience in making change happen within the university. The presentation was highly entertaining and highly informative, and discussed the influence different leadership styles can make to the implementation of the strategy. The second part of the presentation, undertaken by Nicola, introduced the 'Goldilocks' theory for change teams. By identifying the management styles of sponsors and business change managers, and underpinning those styles with just the right mix of guidance and support, ensures change initiatives at Sheffield Hallam University progress safely and with certainty.

All speaker presentations and workshop outputs have been added to the CofEe Club forum, available to all members at [www.citi.co.uk/cofee](http://www.citi.co.uk/cofee). For information on how to join the club contact Amanda Muscat at [amuscat@citi.co.uk](mailto:amuscat@citi.co.uk).

The twenty-third meeting of the CofEe Club will be hosted by Jane Logie, Technology & Business Change Director, Legal & General Group, on Thursday 9th June, 2011 in Kingswood, Surrey.

by **Amanda Muscat**  
CofEe Club Manager: CITI



## size IS everything

As a company defined by our research-based pragmatic models and approaches, we work hard at CITI to stay ahead, focusing on current industry challenges that we find interesting. The more difficult the challenge, the more interesting we find it!

Our latest research looks at using industry benchmarks as the basis for a smart approach to correctly sizing the management overhead for projects, programmes and even portfolios.

This is tricky; there are many factors that can affect the size of a project organisation during its lifecycle. So we are proud to be working with some of the world's most prestigious engineering, defence and infrastructure organisations. We are analysing their actual project data to understand these factors in different environments and get the benchmarks correct.

### practical tools

Nearly 20 years of research already underpins our practical tools used to right-size governance and project management capability. This latest study extends that work by looking at additional factors to consider in sizing project management overhead. This addresses a very real issue for any company running large projects, where even small percentage errors can represent millions of pounds in overspend.

The research analysis is currently being refined, but already we have a tool that translates the many inputs into a 'benchmark' organisation chart with the right staffing levels for all functions and roles connected with the project, which can be tailored using business rules for any organisation's specific environment.

■ For further information about this research study, please contact CITI on 01908 283 600.

by **Simon Green**, Director: CITI, & **Simon Peach**, Change Expert: CITI

# realising potential

EC Harris's and CITI's pragmatic programme has led to the identification of individual development needs in line with best practice project skills.

**International built asset consultancy, EC Harris, is the first professional services firm to achieve Corporate Accreditation by the Association for Project Management (APM) for its alignment with best practice in project management and development of the skills of its project managers.**

As part of its alignment to the APM, EC Harris has embarked on a development programme for its wider project community based on APM's Project Management Competency Framework (PMCF). The highly pragmatic approach has seen CITI working alongside EC Harris to produce mappings between the PMCF and EC Harris project community roles. For each role, some of the competence areas in the PMCF have been identified as core, while others have been identified as supporting competences.

Individual role holders self-assessed against their core and supporting competences. This was followed up with each person being interviewed by a CITI consultant to evaluate their self-assessment and identify potential development needs. Many of these needs are shared with others and a

by **Brian Snowdon**, Professional Services L&D Consultant: EC Harris, & **Simon Green**, Director: CITI

development programme has been planned to address both individual and group activities. A blend of learning events is being used, with a focus on support within the workplace, to ensure that the desired impacts are made.

### development plans

This approach is also being used to the benefit of EC Harris's clients. Most recently it has been deployed for the teams working with BAA at Heathrow, ensuring that EC Harris meets critical client requirements of alignment to, and excellence in, industry best practice such as APM and OGC.

As a company that provides managed services, EC Harris has identified other competences that are relevant to their project community and these have been included in the development plans. Brian Snowdon, EC Harris Professional Services L&D Consultant, observed: "To be famous for PPM, EC Harris has to be able to demonstrate it is at the forefront in project and programme management. In particular, it is important to us that any development has a focus on building best practice, so that we deliver successful outcomes for our clients."

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