

**EFFECTIVE CHANGE MANAGEMENT PROCESSES FOR SUCCESSFUL PMO  
IMPLEMENTATION: A DELPHI STUDY**

by

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## **Abstract**

The Project Management Office (PMO) is becoming an attractive choice for many organizations that are choosing to improve their approach to project management. Based on the popularity of the PMO, companies have made the decision to incept the departmental function into company operations making it a permanent fixture within the organization. The research problem showed that there were problems occurring when PMOs were implemented that led to instability and unsuccessful functioning as a result of unsuccessful PMO implementation. The purpose of this qualitative research study was to use the Delphi study technique to identify the role change management processes play in successful Project Management Office (PMO) implementations by gaining consensus from a panel of 15 PMO implementation industry experts. The findings showed that during successful PMO implementations, constructing a vision for change and communicating change efforts were popular processes, experts believe when change management processes are based on the goals of the organization it is much more beneficial to the implementation and the study discovered key characteristics of solid change agents.

## **Dedication**

This dissertation is dedicated to God, my mother, my father, my children, and my mentor.

Thank you!

## **Acknowledgments**

I would like to acknowledge God first and foremost for giving me the courage, strength, and diligence to see this accomplishment through.

I would also like to acknowledge my Committee Chair, Dr. Charlotte Neuhauser, who provided priceless guidance from the first time she instructed me all the way through to the end. I could not have selected a better mentor. I would also like to thank my committee members, Dr. Clifford Butler and Dr. Linda Dell'Osso.

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## **CHAPTER 1**

### **INTRODUCTION**

#### **Introduction to the Study**

Mustafa (2012) explained that the reason most Project Management Offices (PMOs) experience failure is because they are improperly implemented. This study aimed to investigate what attributes provided the opportunities for PMOs to be sustainable through understanding the role change management processes play in successful PMO implementations. The purpose of this Delphi study was to use experts with experience in successfully implementing PMOs to explore, through the sharing of their experiences and views, change management processes used when a PMO implementation was considered successful. This research used open ended questions as a platform to engage these industry professionals in sharing their knowledge, beliefs and understandings based on their experiences.

The success of PMO implementation is important, because the popularity rate of project management is constantly growing and this growth is accompanied by the desire to implement a PMO. Thorn (2003), mentioned that organizations in different industries are finding interest in implementing PMOs and there is difficulty in doing it correctly. According to Hurt and Thomas (2009) organizations across different industries are recognizing the value in implementing PMOs. The interest in PMOs, coupled with the recognized value has increased the number of PMO implementations, but has also led organizations to realize there is not a one size fits all approach. Nitithamyong and Skibniewski (2011) conducted a study specifically around construction projects and found that a packaged approach to PMO implementation has yet to be designed. Andersen, Henriksen, and Aarseth (2007) stated that a lack of a packaged approach to PMO implementation could be the reason for failure. Understanding what elements that make

PMO implementations successful could be helpful in eventually designing an overall packaged approach that could help eliminate unsustainable PMOs.

Another component of the implementation that creates concern is that the implementation of a PMO can create change that may not be readily accepted by members of the organization. In order to understand the critical success factors of PMO implementations, this study focused on change management processes specifically. There has been very little research around the relationship between PMOs and change management. In fact, Padar, Pataki, and Sebestyen (2011) stated that the study of change management and project management together is not a popular topic because it cannot be clearly defined where the two overlap. The study of this connection between the PMO and change management could be helpful in attaining more successful implementations.

### **Background of the Study**

According to Aubry, Richer, Lavoie-Treblay and Cyr (2011), there is a limited amount of research regarding PMOs as it relates to change in organizations. This is an important topic, because change is a constant experience that is increased once the PMO begins to kick off projects. Glueck (1969) suggested that companies experience constant change through their life cycle, and thus change management should be used to manage these constant transformations. The implementation of a PMO enacts a transformation that touches multiple levels of the organization and Besner and Hobbs (2008) stated that a PMO implementation constitutes the use of change management because of the level of transformation it evokes.

In a study conducted by Singh, Keil and Kasi (2009), it was found that resistance to change was one of the primary challenges organizations encounter when aiming to implement a PMO and the authors concluded further research was necessary. The information presented by

Singh et al., 2009 was a common conclusion as Dent and Goldberg (1999) found that change management was often found to be synonymous with resistance to change.

Whether or not an organization suspects resistance to change, proper measures should be considered to avoid resistance that could ultimately cause challenges for the implementation. Goodman (2006) expressed that most organizations do not consider change management a mandatory undertaking; instead, it is forced by company processes and culture. Change management, while not heavily employed, could be considered quite essential to implementation success.

### **Statement of the Problem**

The research problem covered by this study is the failure in the implementation of PMOs during their formal introduction into an organization. Companies experience challenges when trying to successfully implement PMOs into their organization and often times after the implementation the PMO goes on to perform ineffectively. Mustafa (2012) stated that the reason PMOs fail to operate successfully is due to inadequacies in the set-up process.

Nitithampong and Skibniewski (2011) explained that the cause of unsuccessful PMO implementations was due to the absence of a packaged approach that included the identification of proper change management processes. The inclusion of change management processes in the PMO implementation could lead to the success, of not only the implementation, but also the sustainability of the PMO. Besner and Hobbs (2008) believed that change management was necessary whenever a project ended in changes to the organization. The PMO's governing of projects that connect to an organization's goals proves that a PMO implementation could lead to changes in an organization. A failure in PMO implementations can impact the goals set forth for

the PMO and in turn negatively impact the PMO's ability to sustain within an organization not prepared for change.

### **Purpose of the Study**

The purpose of this qualitative Delphi study was to understand the role change management plays in aiding the successful implementation of PMOs in organizations from the point of view of industry experts. This study used the knowledge and experience of experts in PMO implementations to add knowledge to the growing field of project management. Aubry, Hobbs, Müller and Blomquist (2010) expressed in a study on PMOs that the study of project management, specifically the PMO, adds value to organization as PMOs have been found to be intertwined with other areas of the organization. Andersen et al., 2007 stated in their study on benchmarking PMOs that organizations are looking for trends regarding PMO implementation and that there has been a gap in information related to how to properly establish a PMO within an organization, leaving some companies to actually walk away from the idea.

The findings from this study will offer expert insight into experiences as expressed by field experts in successfully implementing PMOs. It will provide organizations with helpful information that leads to direction on how to avoid proven pitfalls of unsuccessful PMO implementations. This study will also offer information around how to integrate particular change management processes into the PMO implementation activities in order to assist in leading to not only a successful implementation, but also to a sustainable PMO.

### **Rationale**

Using the Delphi methodology created the opportunity to gather information from a diverse group of industries, using practitioners across different organizations at one time. Nowrie (2011) proclaimed that the Delphi technique is successful in aiding both scholars and

practitioners in collecting data which can be supportive information in important decisions made by business leaders. Delphi can be helpful from many angles if the correct participants are selected. As stated by Mäkitalo and Hilmola (2010) the Delphi technique offers anonymity to all participants and the panel is unaware of which comments were submitted by other unknown panel members. The use of experts in the study offers support in validating the results of the findings.

The Delphi study conducted by Pina, Torres, and Yetano (2011) also showed that by using experts, the results of the study are seen as valuable because the technique is used when little information is known about a topic. Information surrounding PMO implementations is scarce and limited. Singh et al., (2009) expressed the need for more information regarding PMO implementations and this study aimed to add to that knowledge. The interaction of the experts is beneficial and as stated by Ogunseye, Adetiloye, Idowu, Folorunso, and Akinwale (2011), and it provides a platform where the entire group can collaborate and deal with the issue together, instead of dealing with the issue one person at a time.

### **Research Questions**

This study includes one primary question and four sub-questions regarding the role change management plays when successfully implementing a PMO. The research question is, Primary question: What is the role that experts believe change management processes play in the successful implementation of a PMO?

The research sub-questions are

1. How do particular change management models serve PMO implementation?
2. What value, if any, does a change agent add to the change management process of implementing a PMO?

3. When implementing a PMO office, how is change management introduced to the organization and incepted into its culture?
4. How does the theoretical foundation of change management drive selected processes to be used during PMO implementation?

### **Nature of the Study**

This study used a qualitative methodology, employing the Delphi study technique using an expert panel as participants. The participants responded to a questionnaire provided by the researcher using an online tool, SurveyMonkey. The online tool was used to distribute the survey instrument, which were questionnaires, as well as collect and store the responses until downloaded by the researcher. Later the software Nvivo was used to facilitate the analysis of the collected data.

The data was used to understand the role change management processes play in successful PMO implementations. During the first round of the Delphi study data was collected based on the definitions and the questions posed in the questionnaire. During the second round participants reviewed the responses of other participants to consider the best compiled responses to understand what change management processes lead to successful PMO implementations and how the change management processes were used during the implementation. The third round of the study was used to determine if consensus could be attained on questions where the minimum consensus threshold was not met. In the fourth round the emerging themes of the study were shared with the participants and participants were asked to share thoughts regarding each of the themes.

## **Significance of the Study**

The significance of this study is gaining further understanding around PMO implementations. As stated by Do Valle, E Silvia and Soares (2008) the concept of a PMO office is continually evolving as more studies are conducted but there is still room for more research. Patanakul, Lewwongcharoe and Milosevic (2010) noted the growing popularity of project management induces the need to further investigate functions tied to project management. There is a connection between the PMO and project management, as the PMO is the governing department over the field of project management. Aubry et al., 2010 affirmed that the PMO is gaining more attention as a topic that deserves further research. Understanding more about PMO implementation will add to the current knowledge on PMO implementations by researching specific areas that add to their success.

This study covered an audience that includes researchers looking to further define valuable change management theories as well as organizations looking to identify proven change management processes for PMO implementation. Stanleigh (2006) attributed the absence of a PMO as a leading reason for why projects fail and thus showed the importance of their existence. The ability to sustain a PMO stems from the ability to properly implement the PMO into an organization and this study believed that the use of change management could increase the chances of success. Douglas (2003) supported the inception of change management process anytime projects were involved.

Stensaker and Langley (2010) found that poor change management planning encouraged resistance to new company initiatives, such as a project control office also known as a PMO. There is limited data around the claims regarding the impacts of change management on PMO implementation and Singh et al., 2009 noted the importance of gathering further data to offer

substantive research around how change management processes can be used to combat resistance to change and lead to assisting in successful PMO implementation.

This study is also significant to the field of Organization and Management as management is the core operation of project management. Morrison, Brown and Smit (2008) conducted a study that showed a relationship between organizational elements, such as development and culture and project management. Kuzmanova (2012) conducted a study that focused on the competencies of an organization, finding that change management is successfully orchestrated at the organization level. Thus both PMOs and change management are directly connected to the concept of organization and management and this study worked to provide more knowledge to show the connectivity between the organization and the presence of project management.

### **Definition of Terms**

*Change Agent* is an individual designated to manage and champion the organizational change, while also assisting in defining and implementing the changes into current culture (Koene & Shahzad, 2011).

*Change Management* occurs when an organization prepares its associates to accept impacts to particular levels of the organization (Gans, 2012).

*Change Management Processes* are the framework for change management theories and are used to manage changes (Douglas, 2003).

*Change Management Model* is the construction of relevant concepts in order to deal with strategically planned transitions from one situation to another (Shoham, & Perry, 2009).

*Delphi Study* is an iterative process that gathers feedback on a specific area of study through the use of an anonymous panel (Grisham, 2009).

*Project Management Office* is the office within a company that is responsible for managing the disciplines of project management (Hurt & Thomas, 2009).

*Project Management Office Implementation* is the act of making project management practices official by creating an office to oversee and control the project management activities (Aubry, 2011).

*Successful Project Management Office Implementation* occurs when the Project Management Office has a strong supported presence within an organization and is dedicated to overseeing the management of the company's projects, programs and portfolios that have been elected because they connect with the goals and objectives of the company (Kaufman & Korrapati, 2007).

### **Assumptions and Limitations**

This study assumed participants would be transparent and honest about background information qualifying them to meet the study criteria. Nworie (2011) stated a common Delphi study assumption is that the participants have the knowledge needed to participate in the study, as well as the interest to remain involved during the duration of the study. The study conducted by Nworie (2011) also assumed that a consensus would be attained after three rounds.

There were further assumptions that related to participant knowledge. There was an assumption that each selected participant understood change management processes and how to identify those processes. There was an assumption that the PMO implementation referenced by each participant was successful and had existed for at least three months after the implementation. There was also an assumption that the Kotter model applied to the PMOs selected. The Kotter change management model was the theoretical framework used in this

study to determine the role change management processes play in successfully implementing PMOs.

The limitations of this study involved the definition of panel expert and the interpretation of each participant's ability to qualify as an expert. This limitation can be supported by other studies, but cannot be resolved prior to the start of the study. The information gathered by this study was limited to the knowledge and experiences of the panel selected and the ability of the researcher to analyze the responses in an unbiased manner and return the round two and round three questions in an appropriate manner.

### **Organization of the Dissertation**

The remainder of the study begins with Chapter Two, which includes review of the literature. The literature covered issues related to PMO implementation and the lack of a needed connection between change management and PMO implementation. Chapter Three consists of a discussion regarding the methodology, the description of participants, data collection methodology and instrumentation. Chapter Four includes the data analysis, the type of analysis used and further descriptive information regarding the participants and their responses. Lastly, Chapter Five includes a presentation of the findings, conclusion, limitations, and recommendations for practice based on the analysis of the data.

## **CHAPTER 2**

### **LITERATURE REVIEW**

#### **Introduction to the Literature Review**

This chapter presents the theoretical framework for the study by illustrating the need to identify the change management processes associated with successful PMO implementations and the role played by the change management processes. Literature pertaining to PMO implementations and the role of change management are also presented within this chapter. This study focused on a standard PMO. Andersen et al., 2007 defined different levels of PMOs while Hill (2004) distinguished PMOs by stages and this study will use Hill's standard PMO stage, which manages multiple projects and employs project and program managers.

The purpose of this research study is to explore the role change management processes play in successful PMO implementations using a Delphi study. The literature review was used to provide evidence in relation to the problem under examination, suggest why this particular Delphi study was necessary and demonstrate its capability for adding to the existing body of literature on this topic.

First the literature shows the need for this study and the importance of understanding aspects of successful PMO implementations. Second, the literature helped define and identify change management processes based on change management models. Finally, the literature focused on change management processes that have been found in successful PMO implementations and showed how organizations use PMO implementations in their organizations.

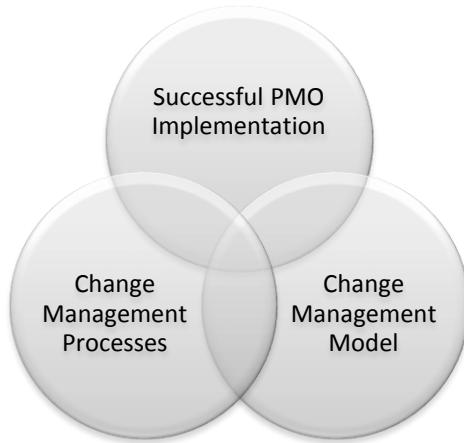
The literature was used in order to collect information regarding how successful PMO implementations are defined and how change management processes are used during

organizational change and implementations. The conclusions of the literature were used to draw connections and show the consistencies and differences between the research articles. Through the literature review, the study was positioned to identify gaps and better understand the need for change management in PMO implementations.

As project management continues to grow, the interest in the Project Management Office (PMO) continues to rise in a diverse group of industries. The purpose and focus of this study is to investigate what role change management processes play in successful PMO implementations. The study of project management office implementations in different organizations will assist in forming valuable information that organizations can use to help eliminate the possibility of an unsuccessful implementation.

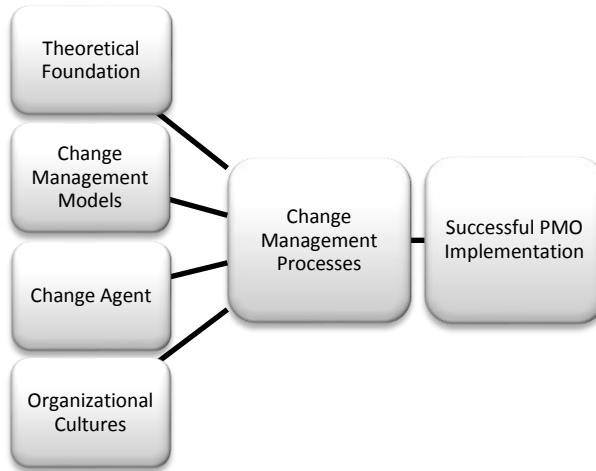
### **Theoretical Framework**

Figure 1 represents the conceptual framework for this study, highlighting the three areas of focus. The areas of focus include successful PMO implementations, change management processes and a change management model. Aubry et al., 2011 explained in a case study on PMOs that the best way to define a PMO was to examine the characteristics of a PMO. This study will explore change management processes as a characteristic of successful PMO implementations. Change management processes are not the only characteristics of a PMO as Aubry and Hobbs (2008) conducted a study on typology for project management and found there to be many variations in the structure and implementations of PMOs.



*Figure 1.* Conceptual framework for the research study

The purpose of this research study was to identify the role change management processes play in successful PMO implementations. Figure 2 represents the theoretical framework for this study and covers how particular elements within change management processes can play a role in successful PMO implementations. The areas of change management processes considered in the theoretical framework included the foundation of change management processes, change management models and those models that included the concept of using a change agent and the implications of the change on organizational culture. This study focused on change management as it relates to the organization. Change management has been used in relation to its involvement in successful PMO implementations.



*Figure 2.* Theoretical framework for the research study

### **The Value of Delphi Technique**

The Delphi technique is considered a rapidly growing and successful tool. Donohoe and Needham (2009) stated that the Delphi technique is a fifty-year-old qualitative method that is gaining support in the academic world. According to Mullen (2003), the Delphi technique is used to construct communication in a group format but maintain anonymity.

This study employed the Delphi study to explore the difficulties surrounding PMO implementation and found that other studies had success when using the technique. Pina et al., 2011 used the Delphi technique on an implementation of strategic management study; Singh et al., 2009 used the Delphi technique to conduct a study on PMO implementation; Bevilacqua, Ciarapica, Giacchetta, and Marchetti (2011) used the technique to study implementation of quality procedures.

Using the Delphi technique for this study provided additional support to the use of the technique, also showing the value within qualitative studies. As stated by Hallowell and Gambatese (2010) there has been much deviation from the Delphi study that was introduced by Linstone and Turoff with regards to the number of rounds, the point of consensus, and the

number of participants. This study used research to define the boundaries that would be used during the study in order to ensure compliance with standards.

### **Understanding the PMO**

A project management office (PMO) is the core focus of this study. A PMO or project management office, according to Julian (2008), can be known by many terms, but all terms represent the concept of ownership over the responsibilities of project management. Hurt and Thomas (2009) believed that the PMO concept began in the early 1990s and was designed to manage responsibility and oversee the disciplines of project and program management. In order to understand the PMO, it is first best to provide information around project management.

Harding (2012) specified projects were inclusive of three primary components, which included scope, schedule and budget. Morris and Geraldi (2011) believed that projects were comprised of the use of different instruments and practices, used by professionals since the early 1950s. Projects were considered endeavors undertaken by an organization to meet specific goals. Hallgren and Maaninen-Olsson (2009) defined project management as having a unique task or solution where uncertainty is managed by planning efforts. The definitions for project management do not vary; they focus on separate areas of its proposed functions.

Understanding the history of project management can be more challenging than understanding a solid definition. Turner, Ledwith, and Kelly (2009) believed that project management was first instituted to manage larger projects in construction and aerospace while researchers such as Lenfle and Loch (2010) believed it to have begun with the Manhattan atomic bomb project. When researching older articles by authors like Stewart (1965), project management was stated to have been unrecognizably present during the time when Egyptians

constructed the pyramids. Based on the definitions provided above, it is possible that all of the links to history are feasible.

Despite the origin of project management, it is agreed that the PMO was formulated to serve the processes of project and program management. Buijs and Edlenbos (2012) defined program management as an effort to connect single projects with the objectives of an organization. Program management involves the combination of multiple similar projects to increase the efficient use of resources. Shao, Muller and Turner (2012) described program management as the act of assimilating projects with company strategies and added that this practice has continued to evolve based on its success. Murray and Kagan (2010) related program management to the PMO by stating that the PMO's responsibility is to meet business objectives when overseeing the execution of programs. Projects and programs are strongly connected and fall within the organizational structure of the PMO.

While programs and projects together create the need for the PMO, the PMO is a function of the organization that needs its own privatized attention. In an article by Martin, Pearson, and Furumo (2007) it was stated that a PMO is used to standardize project practices but it is also responsible for other duties including training and consulting. Rad (2001) described the PMO as an entity that is known for providing tools for project teams and managing the prioritization and strategic alignment of projects to company goals and objectives. These definitions are closely related and show the governing theme that lies within the definitions of a PMO. Hobbs and Aubry (2007) added that the primary function of a PMO was to standardize the methods and processes for project management while providing guidance and support to project managers. These definitions provide explanation as to why an organization would elect to implement a PMO into a company.

In their study, Martin et al., 2007, asserted that organizations choose to implement a PMO, specifically to achieve project success. The PMO could assist in aligning company goals with company initiatives. Gorog (2011) stated that PMOs are designed to foster the success of projects and in order for PMOs to be successful in purpose, the PMO implementation must prove successful as well. While PMOs have been found to be useful Thorn (2003) concluded in a study on PMO implementation, that the process is still a work in progress and needs further investigation in order to show successful performance. It should be noted that within this study the PMO implementation is not being studied as an event, only the processes used during its actual occurrence. The PMO implementation itself can be considered a project and thus the way in which organizations have conducted implementations can lend specific information to this process.

Aside from definitions for PMO, many researchers lean towards providing the purpose of the PMO. Some PMOs are connected to the need to properly manage budget, while others assess the ability for PMOs to increase overall performance. Kaufman and Korrapati (2007) defined PMO frameworks as the creation of a departmental unit that has the responsibility of directing the management of the company's projects, programs and portfolios that are strongly connected to the goals and objectives of a company. The framework for a successful PMO implementation can help in identifying critical success factors. Julian (2008) stated that PMOs are known to improve project management performance and to control the projects. This finding shows the importance of the PMO to organization leadership.

Feldman (2010) conducted a study and found the top three purposes served by a PMO include project prioritization, standardization of projects and offering visibility to organizational leadership. Aubry, Richer, Lavoie-Tremblay, and Cyr (2011) stated that a PMO implementation

incepts new technology and processes into an organization. The growth and development offered by the implementation of a PMO hints at the possibility of change and creates a need for special attention. Aubry et al., (2011) stated that the implementation of a PMO is the act of making project management practices official by creating an office to oversee and control the project management activities.

While the effects of a PMO sound rewarding, Martin et al., 2007 stated that companies should detect the core advantages of a PMO, the role of the PMO in the organization and the company's ability to manage the change prior to electing to implement a PMO. Some companies may be better equipped to house project managers as opposed to fully implementing a project management office. The leadership in organizations responsible for making these decisions offers the reasoning for the claim in how a study around PMO implementation would benefit from a qualitative study.

### **Defining Successful PMO Implementation**

While the definition and purpose of the PMO appear clear, implementing a PMO can still end in failure. The act of implementing a PMO does not always end as expected or hoped. These are elements that can be used as a benchmark to determine whether the implementation has completed successfully. Anderson, Henriksen, and Wenche (2007) stated that PMO implementations found success when there was support from executive leadership and the leadership of the organization granted efficient authority to the PMO. In order to determine the need for PMO integration into an organization, the company should investigate the criteria for a successful PMO and further understand the framework of a PMO prior to investing in an implementation.

Bates (2012) stated that the inception of a PMO into an organization is their attempt to improve upon their project management. This study described the PMO as a function of the company that resides at the leadership level. Most organizations are not created with a PMO. PMOs come later when organizations realize the value in project management. There are different approaches to how a PMO is incepted into an organization and the absence of a recognized model could be a contributing factor to those experiencing failure. Marin-Garcia and Poveda (2010) stated that organizations fail in implementations due to the lack of planning when extending a significant amount of time and resources. When planning for PMO implementation, change management has been used as a component of successful PMO implementation. Do Valle, E Silvia and Soares (2008) considered the implementation of a PMO a project and believed that organizations that practice project management are automatically engaging in change and should equip themselves with change management procedures.

### **Defining Change Management**

Change management is important to implementations. Merrell (2012) stated that understanding effective change management makes the difference between executing successful projects, which make up a project management office. Organizations that have decided to use change management processes automatically positioned their company for success. Gans (2012) explained change management as the act of an organization preparing its associates to accept impacts to particular levels of the organization. Preparation is key in both change management and project management.

According to Tosey and Robinson (2002), change is the process of transforming from one way of conducting business to another. Seebert (2008) described organizational change as the act of demanding that those impacted, change their current behavior and routines. In a study by

Mohrman and Edward (2012) it was found that it is natural for organizations to face constant change and in order to remain successful, they must prepare for and plan for the changes.

Change management can be inclusive of a variety of different processes when used.

This study looked at the processes within change management to determine which were used in successful PMO implementations. According to Natase, Giuclea and Bold (2012) change management is the implementation of the organization's ability to adapt to and control changes that impact specific areas of the organization. Adaptation and control appear to be owned by the organization. Newman (2012) defined change management as a process used by organizations in order to communicate change and actively engage resources that would be impacted by the change or the potential transformation brought on by the change. Change management processes are embedded in change management models.

Different models of change management are comprised of different processes. Kelly's (2010) study found that appreciative inquiry was the favored solution for managing change in libraries. Kemp and Low (2008) found value in change management processes when they researched the success of implementations. The value of change management lives across different industries. The theoretical framework for this study, as shown in Figure 1, is based upon Kotter's change management model. While there are many change management theories to choose from, this study used Kotter's eight step change management model as a foundation that guided the study and assisted in defining the constructs. Kotter's (2005) change management model was specifically designed to assist companies in change management efforts. Hornstein (2012) confirmed that organizations need to integrate project and change management to ensure success in project initiatives and cites Kotter's model and its connectivity to project management.

## **Change Management Theoretical Foundation**

Change management evolved from the desire to manage organizational shifts, which companies found to be something that would not disappear. Doerscher (2011) stated that change began with a simple decision from a management team and the concept continued to experience growth from that point. As scholars and practitioners became more enlightened around the subject of change, policies began to emerge that helped companies understand change and how it related to organizational goals. In a study by Caldwell, Truong, Linh and Tuan (2010) it was found that Human Resource managers were the leaders in the change management efforts.

Once project management became more popular and companies began to understand the connection between projects and change, a closer focus was developed in order to help organizations better manage this connection. Originally, as found by Mobrman (2007), companies would use their Human Resources department to analyze and interpret company goals in order to align with change management needs. Thus the connection between change management and successful projects, herewith in, also referred to as an implementation is becoming increasingly important.

Griffith-Cooper and King (2007) conducted a study on the relationship between project management and change management and found that it was necessary to construct a change management plan for the integration and use of project management. The identified connection between project management and change management helps develop the connection between change and the PMO. Johnson, Joyner, and Martin (2002) mentioned that just as there are processes used in project management, there should be a degree of processes employed to implement a PMO. Planning for change is already listed as a component of particular change models; however some organizations elect to create their own approach.

The belief that change management was essential transcended into the development of change management models. Besner and Hobbs (2008) believed that in the event a project resulted in change, that it was necessary to employ change management. The purpose of developing change models was to create a centralized approach to managing change. There were a few models that surfaced early on to begin the trend for change management models.

Kurt Lewin's three-step change management model was one of the first documented change management models designed. The use of change models continued to evolve, growing from three steps, to a more robust approach. Once the success of Lewin's model had declined, other models were presented with the goal to help fill the gaps. Lennox (1994) discovered a change management model designed by Gerard Egan for organizations interested in updating structural design. Designs by Lewin and Egan were found to be useful, however this did not stop the continued evolution of the model.

DiClemente (1999) reviewed a model created by both Prochaska and DiClemente, which was a six-step change management model initially designed to support family therapy and later transformed to support organizational change. Models continued to surface as industries discovered they had more specific needs. According to Struebing (1997), ProSci, Incorporated, a Colorado based company, is responsible for the ADKAR change model. The ADKAR acronym represents five stages of the change model and is the effort of an entire organization as opposed to one individual. Kotter's eight-step model was also a more contemporary approach, and according to Graetz, and Smith (2010) models such as Kotter's allow change management to be handled and controlled as a single event. Change management, while orchestrated by organizational leadership, still remains absent in areas where needed and thus those responsible for implementing PMOs are using existing models to aid in their quest for success.

## **Change Management Models**

This study used the model of change management to assist in determining the role change management processes play when successfully implementing PMOs. Battilana and Casciaro (2012) proved the significance of process focus when they developed a study solely around the importance of using change agents as a component of the change management process. Selecting a change model can be an essential step in understanding what change management processes are necessary for a successful implementation. Change management theories exist to provide support across a diverse group of industries, but none specifically identified to tackle challenges faced by implementing a PMO.

Models that most closely relate to those related to project management have been found as most beneficial for implementations. The implementation of a PMO in itself can be considered a project. In a case study conducted by Manikandan (2012) it was found that the creation of a change management model was necessary to manage a project.

Lewin's three-step model was simplistic and not robust enough for an endeavor as complex as an implementation. According to Levasseur (2001) Lewin's change model was inclusive of three phases, which included unfreezing, transitioning, and freezing. Schein (2001) explained in more detail that each phase had a specialized purpose, with the first phase consisting of communicating the change, the second phase covered changing attitudes and shifting to the new process and the final phase was freezing the mindset on the change. The three-step model was simple and created an interest in the concept of a change model.

In a change model overview by Lenox (1994) three options that an organization could undertake for managing change were presented. The first model involved the assessment of the organization's current ability, while the second model focused on management created a scenario

that best fit their desired outcome. The final model was to single out and deal with the changes related to office politics and culture. While these models appeared sensible and applicable they lacked the guidance and clear structure to carry out.

The model created by Prochaska and DiClemente was much more detailed, adding additional steps to create a model that focused on behavioral impacts, which meant this model could be used in addition to other models that focused on other areas. McNevin (2011) described each stage in the model as pre-contemplation, contemplation, preparation, action, maintenance and termination. Pre-contemplation involves the lack of anticipation for the change, contemplation is the established goal for change, accompanied with resistance. The preparation stage sets the environment for planning for change and the action stage is the stage where the change is executed. Finally, maintenance is the continued work on the changes and termination, which covers the individual at the change and termination, which is relinquishing apprehensions regarding behavior relapse. Bowles (2006) worked to build upon the Prochaska and DiClemente model, but the focus was women in violent relationships. Bowles use of the model proved its versatility and limitations. Logie-MacIver, Picacentini, and Eadie (2012) later used the model to further understand behavioral change in their qualitative study. The validity of a model can be demonstrated through the successful application of the model's phases and in the final results.

The increasing need for valuable change management models created a demand for researchers to continue to develop models that could be useful in a diverse market. The ADKAR five-step model was an acronym used to represent awareness, desire, knowledge, ability, and reinforcement (Sacheva, 2009). According to Sande (2008) awareness meant understanding the change was imminent; desire was encouraging those impacted to accept the change, while

knowledge was providing information regarding the change. Ability was applying what was learned through the change and finally the reinforcement of the knowledge. Amiri, Rasaeefard and Dastan (2011) recommended the use of the ADKAR model for companies that wanted to increase their knowledge on the subject of change. While the steps presented with the ADKAR model could be beneficial to implementation, the guidance for each step is very minimal.

Kotter incepted a new change model in the 1990s to respond to the needs of new managers in corporate settings facing constant changes in the workplace. Kotter's model includes eight steps, and this study's sub questions focused on some of Kotter's primary processes when trying to understand their link to successful PMO implementations. Sacheva (2009) presented Kotter's eight steps as increasing urgency, building a team, constructing a vision for the change, communicating the change, empowering the change, creating goals that are short-term, persistence and making the change permanent. Kotter (2005) proclaimed the model was designed to support organizations that had experienced issues in change management efforts. Kotter provided an eight-step progressive model, where in order to be successful, each step required a specific amount of time and attention.

Models, whether designed from scratch or modified, can encourage the success of implementation and it is the organization's responsibility to drive this use. Zdanytė and Neverauskas (2011) stated that organizations are responsible for identifying and executing other strategies in order to be successful when managing the projects. Ronnenbert, Graham, and Mahmood (2011) cited Lewin and Kotter's model with regard to aiding to successful implementation project, stating it was necessary to use a change management model.

## **Change Management Processes**

Currently change management models exist that embody processes that can be beneficial to a number of different implementations. Hammond, Gresch, and Vitale (2011) conducted a study where employees internal to the organization successfully created a change model for a known change. While other organizations may not be positioned to take this route, other models exist. Kotter (2005) created an eight-step change model, and DiClemente (1999) along with Prochaska, developed a six-step model. Patel (2012) expressed the importance of change management in PMO implementation during a study on the application of different implementation approaches used. The designed model included processes for managing change and company cultural impacts. Kemp and Low (2008) conducted a study on ERP implementation and suggested the focus on three areas of change management including communication, project promotion, and training.

This study investigated the specific processes employed by organizations successfully implementing PMOs. Kotter's eight-step change model contains tools very closely associated to processes executed in project management efforts. Kotter's model is designed to offer abilities for adaptation to a diverse group of industries and situations. Table 1 shows an illustration of the descriptive study conducted by Periyakoil (2009) explaining the details of each of Kotter's eight steps.

Table 1  
*Kotter's eight-step change model*

Kotter's Eight-step Change Model	
Step	Explanation
1. Establish a sense of urgency	Set the stage to help people understand the need and call for the change.
2. Create a coalition for change	Select champions within the organization to help lead the change.
3. Develop a strategy	Identify a realistic vision for the future that explains the expected end result.
4. Communicate the change	Share the vision with others in the organization.
5. Identify and overcome resistance	Work to empower those who will be impacted by the change but experience reservations with the change.
6. Generate short term success	Establish an early triumph in the project to motivate the team.
7. Consolidate gains and produce more change	Learn from the mistakes along the way and do not confuse small wins with endless victory.
8. Anchor the changes in the institutional culture	Penetrate the organization with the change by making it stick.

The first step of Kotter's model advises creating a sense of urgency. According to articles published by Alas, Sun and Gao (2012) and Decker, Durand, Mayfield, McCormack, and Skinner (2012), the use of change management processes within an organization should be treated as change itself. Thus, in the attempt to create the sense of urgency and need for the PMO implementation, the organization must also set the stage for the actual implementation of change management.

The second step of the model encourages creating a coalition for change, which this study directly related to identifying a change agent, discussed later in this chapter. The coalition is not the agent alone, but includes a team of individuals who rally to champion for the change. Coch and French (1948) conducted a study and concluded that when organizations allowed individuals

to participate in the design of the change processes, it was more unlikely they would resist the change. The coalition could in turn create a sense of support for the effort. Simonelic (2006) stated that this change management team should be inclusive of leadership who understands the urgency and are capable of forming an alliance. Kotter and Schlesinger (1979) asserted the essential nature of selecting the correct individuals for this task, as through selecting incorrect champions could lead the change to failure. This means that it is necessary to aptly appoint members of the team and show carefulness when selecting team members.

Step three advises the change management team to create a plan for the change. Rosenberg and Mosca (2011) expressed in a study on organizational change that the foundation of the strategy must be durable to sustain the entire change effort. A study on organizational change conducted by Shin, Taylor, and Seo (2012) found that resources play an integral role in the success of organizational change management efforts and that it is necessary to get them on board as soon as possible. Planning, also associated with the PMO, creates a roadmap for the above-mentioned team to execute in order to remain aligned with the business objectives. The strategy for the change should include details around how the other steps are executed.

Communication of the change is also imperative to managing the change from start to finish.

The fourth step, which involves communicating the change, is comprised of much more than the dissemination of a memo stating the change. Schultz (2007) indicated that communicating the change also implied creating a forum for individuals to express their emotions and thoughts regarding the change. In addition, Kotter and Schlesinger (1979) noted that change, in some cases, is readily accepted, while in others employees immediately express contempt upon receiving communication. This implies there are multiple response attitudes to change, and organizations should be prepared for the positive and negative. In a study conducted

by Stragalas (2010), Kotter's communication step was defined as ensuring the proper messaging channels were selected. This included messages for communicating the change, and coaching and training management for the change.

The fifth step covers how to deal with individuals who are impacted by the change and refuse to accept it. Smollan (2011) believed that there was more than one dimension to resistance to change and explained that resistance is not always recognizable. In the study, it was noted that it is important that the change team is not only able to identify resistance on different levels but also that each party maintains the same level of thinking when defining resistance. Below is a list of Rosenberg and Mosca's (2011) illustration for resisting change in organizations. Reviewing the list reveals an extensive number of reasons individuals may feel the need to express resistance which could give the change management team insight into the types of resistance to keep on the radar.

Reasons for resistance to organizational change:

- An employees' attitudes/disposition towards change.
- The fear of the unknown or uncertainty.
- Lack of understanding of the firm's intentions.
- The fear of failure.
- Disruption of an employee's routine.
- Increased workload (due to downsizing or employees leaving voluntarily/involuntarily).
- Lack of rewards for implementing change.
- Perceived loss of control, security, or status.
- Poor leadership.
- Dysfunctional organizational culture.

- Organizational size and rigidity.
- Lack of management support for the change (organizational commitment).
- Lack of trust between management and employees.
- Inability or unwillingness of management to deal with resistance.
- Lack of participation due to top-down steering.
- Organizational politics/conflict.
- Internal conflict for resources.
- Lack of consequences for inadequate or poor performance.
- The content of the change (an ill-conceived change/relevance of the goals of change).
- Poor implementation planning.

Generating short-term success is the sixth step and it involves creating small victories to help in championing the change. Botezat (2012) concluded in a study on managing change that not enough attention was given to motivation. People should feel that things are progressing and the effort is worth the outcome. Klarner and Raisch (2013) noted in a study on rhythms of change that there are different paces for which change can take place. It should be taken into consideration that if the pace is too fast or too slow it could ruin even the successes experienced during the course of the change. Andre (2013) urged in a study on change that moving too quickly is one of the leading errors when implementing change. Kotter's model in step one urges companies to create a sense of urgency but does not identify if the urgency ties into a quickened pace for implementation of the change.

Step seven involves consolidating gains while continuously producing change. In a study conducted by Kovoor-Misra and Smith (2011) they explained that Kotter's intention for consolidating gains was to not acknowledge untimely successes. It is imperative that change

management teams are selective when sharing successes and creating an opportunity to institute additional change. Alas et al., 2012 stated that identifying improvement to consolidate can be difficult, but there are many areas to look for them including training. The consolidation of efforts could aid in maintaining traction for the change. Kalyani and Mahima (2011) stated that within their HR study accomplishments were identified by reviewing the long term goals. The authors also advised to identify how the gain was accomplished as well. Understanding the gains produced during the change can be a beneficial added value for future similar implementations.

Solidifying the change into the organization is the final step. Once the change has been finalized it must be made to fasten to the organization in order to be considered a success. Roberto and Levesque (2005) suggested a four-step model shown in Figure 3 below that covers how to make changes stick after implementation. The processes are very similar to those Kotter suggests implementing prior to the change and those listed in Figure 3 could be viewed as healthy re-enforcement.



Figure 3. Four processes for making changes stick

Schultz (2007) confirmed the approach of reinforcement of the change and added that success does not end with the change based on appearance. Once the implementation has been completed, the change has to be continuously monitored and managed until the transition is complete. In an article by Rogers, Pace, and Wilson (2002) the content focused on expediting the change management process but it concluded that anchoring the change could be mastered by leadership becoming champions and encouraging the acceptance of the change. Change being understood, accepted, and applauded can be guided by change agents.

### **Change Agent**

The concept of a change agent is found in Kotter's change model, and it was also a topic of investigation during this study. According to Koene and Shahzad (2011), a change agent is an individual designated to manage and champion the organizational change, while also assisting in defining and implementing the changes into current culture. Change agents can be individuals or team, depending on organizational preference. Battilana and Casciaro (2012) stated that change agents are considered valuable forces in change management, which means it is important to understand their purpose.

Whenever an organization makes a decision to make a change that inevitably impacts individuals connected to the organization, there is a risk of different types of behaviors being exposed. In order to control specific or all aspects of the change being implemented, some organizations elect the use of a change agent. According to a study conducted by Battilana and Casciaro (2012) on 68 change initiatives, change agents can assist in successful change by creating a clear plan of execution that recruits and empowers support of the change.

In order to carry out the purpose that lives within change agents, organizations have to be strategic when making a selection. Birkinshaw, Mol, and Hamel (2008) elaborated that

responsibilities of change agents included understanding the change, generating interest in the change, and ensuring the change takes place. The article also stated that change agents could be internal or external to an organization. External change agents could create a non-biased presence within the implementation in order to maintain consistency with message delivery by not being connected to potential outcomes. This approach allows change agents to create the sense of urgency, elect communication leaders, and create champions to help empower the wins.

Rogers, Pace, and Wilson (2002) expressed a firm belief that change measures needed to be quick and it is often the responsibility of the change agent to create this sense of urgency. Turner et al., 2009 argued that it is possible for project managers to consider themselves change agents as leaders of the initiative and their connectivity every aspect of the project. This in turn could empower project managers to enforce the sense urgency. According to Battilana and Casciaro (2012), when change agents are used, they can be powerful forces in change management due to their political connections and relationship to the change efforts. Change agents can own the way the organization views the change.

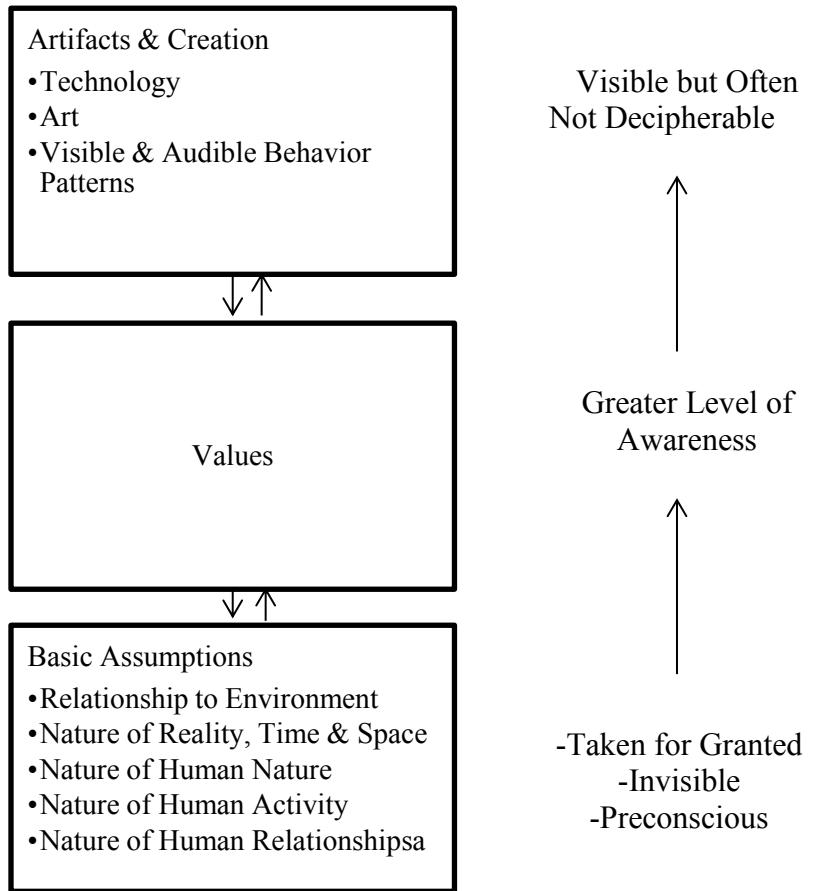
Change agents are appealing to organizations where there is a fear of employees rejecting change or exerting negative behavior towards the idea of change. The first problem with rejection is lack of knowledge. Seddon, Calvert, and Yang (2010) explained that lack of education regarding the change was an identified source for rejection by employees. Selekman (1945) affirmed that resistance not only derived from lack of communication, but also the disruption caused by the change. Arrata, Despierre, and Kumra (2007) discussed the level of skill sets needed by change agents included sociable, resourceful power and the ability to exert strong communication skills. The article went on to state that change agents must also form teams that have a good balance of skills that would service the change agent when necessary.

Stensaker and Langley (2010) stated that ineffective change management increased the possibility of rejection in adoption of new projects. Change agents can carry a level of value that places an organization in a position to be more successful when implementing projects that cause different levels of change.

## **Organizational Cultures**

This study investigated the role change management processes play in successful PMO implementations, and it also considered the impacts of change on organizational culture with or without change management processes. In addition this study also showed how change management was introduced to the organization and incepted into its culture. Danisman (2010) defined organizational culture as the behaviors and values assumed by the associates of a company. Yazici (2011) supported the definition used by Danisman and added that organizational culture could manifest itself differently in different areas of an organization. It is important to understand how change affects organizational culture before and after the change.

Understanding change and organizational culture can mean understanding where culture resides in the organization. Schein (1985) stated that organizational culture is assumed behavior based on what is invented by a group of people in an organization. The different levels as described by Schein (1985) are shown in Figure 4 and show the different areas where the culture can be identified and other areas where it is more difficult to ascertain.



*Figure 4.* Levels of culture

First understanding the organizational culture can lead to further understanding of where and how the culture is impacted by change. Schein (1996) who was found during research to be highly respected and referenced with regards to discussions surrounding organizational culture believes that organizational culture is underestimated. Therefore, specific focus in this area during change could be beneficial. Carlstrom and Ekman (2012) confirmed that organizational culture could actually lead the manifestation of group resistance. This means that individuals in strong support of current organizational culture will use behavior found in that culture to resist changes that could impact the culture. Danisman (2010) found in a study on resistance to change

that culture could also include societal culture that has found its way into the organization. Thus what an organization believes to be its culture could change due to outside influence.

The definition of an organization's culture can be misunderstood and can cause some efforts to fail. Simonelic (2006) stated the culture is officially impacted once the change has become a permanent component of the organization. Glor (2007) stated that almost 70% of organizational changes fail because the culture is not assessed for its level of ability to adapt to the change. This article represents the connection with organizational culture with change management. In a study by Procca (2008) on integrating project management models within an organization, it was found that there were inevitable impacts to culture. In the study, it was concluded that creating model that includes reviewing how organization culture would be impacted by change would be helpful.

Impacts to organizational culture do not have to be negative. Shin et al., 2012 noted that 50% of change efforts fail because employees find change disruptive as it is not successfully integrated into the culture. In a study by Morrison et al., 2008 they found when a company decides to use project management systems it is necessary to incept behavioral ideas into the culture so that it is not strongly disrupted.

Nongo and Ikyanyon (2012) conducted a study on organizational culture and found that it is a critical success factor for organizations trying to reach corporate goals, including adapting to constant changes. Not all models take a look at organizational culture, which is what makes Kotter's model a good choice for PMO implementation. Link and Zerfass (2011) asserted that a change management model must incorporate the cultural innovation in order to be properly managed. Organizational Culture, with proper planning, is capable of having positive impacts within the company. According to Morhart, Herzon, and Tomczak (2009), during change

management efforts, as a part of shifting organizational culture, leadership should create champions in the employees. It connects with the points earlier of allowing employees to become a part of the change. Viega and Pfeffer (1999) concluded that managers should invest in people and their connectivity to the culture during the change process as it leads to more success in the company.

### **Summary**

The literature covered in this study reviewed the journey of project and program management and how the importance of a PMO came to be founded. The need for the PMO derived from the organization's desire to have a department that was specifically designed to oversee the governance of projects and programs. The literature expressed criteria for identifying successful PMO implementations and also reviewed the areas in which more study was necessary due to numerous failed implementations. The literature also covered the history of implementations and the importance of understanding the value of change management processes used during these implementations.

The literature next covered the history of change, change management, and how change management models evolved from Lewin's three-step model to the study's referenced Kotter eight-step model. The literature found that while there were both seminal and contemporary change management models, Kotter's model served best for the constructs of this study. Next, the literature went into detail to explain change management processes overall and finely detailed each of Kotter's eight steps, as it related to the study. Primary focal points were pulled from Kotter's eight steps which led to further literature review in more specified areas.

Once the processes were defined, the literature turned to focus on change agents, who were determined useful and necessary when leading change. It also covered impacts to

organizational culture. The literature first defined organizational culture, then it showed the different levels of organization where culture could be expressed. The impact change has on culture within the company when change management processes were present and absent was reviewed, as well as how change management is used to incept changes into standing organizational culture. The literature is used to set the foundation for the areas the study covered to properly supply foundational and theoretical information to support the findings.

## **CHAPTER 3**

### **METHODOLOGY**

#### **Introduction**

The purpose of this study was to use the Delphi method to understand the role change management processes play in successful PMO implementations. The researcher used experts to answer the questions posed by the study which include the following:

Primary question: What is the role that experts believe change management processes play in the successful implementation of a PMO?

Sub-questions:

1. How do particular change management models serve PMO implementation?
2. What value, if any, does a change agent add to the change management process of implementing a PMO?
3. When implementing a PMO office, how is change management introduced to the organization and incepted into its culture?
4. How does the theoretical foundation of change management drive selected processes to be used during PMO implementation?

This chapter covers the methodology for the study, which includes the research design, research sample, data collection, and analysis methods. A qualitative method was chosen for this study, as it was identified as the best method for answering the study question. Clark (2009) defined qualitative research as collecting data through varied approaches that created opportunities to capture experiences and perceptions, which is beneficial to studies that are further exploring topics.

A Delphi study method was chosen because it presented a platform from which data closely related to the problem could be collected. In a Delphi study conducted by Pina et al., 2011 they affirmed that the Delphi technique is best served on topics such as this study, where there is little known information. Researchers such as Nakhoda and Alidousti (2011) used a Delphi study to research the development of a change management model for libraries and Singh et al., 2009 used this type of study to investigate the challenges faced when implementing a PMO. Both of the studies mentioned above cover change management and PMO implementation, which are the topics reviewed in this study, and thus show the consistency in use with this methodology.

Delphi has a wide range of definitions and can be applied differently with each study. This study used a Delphi survey in order to gain consensus, as used by Soer, van der Schans, Groothooff, Geertzen, and Reneman (2008) in their study on functional capacity evaluation. According to an article by Mullen (2003), which included information on a book by Delphi elites Linstone and Turoff stating that the pioneers refrained from defining the Delphi method, Mullen confirmed that the method was designed to use a communicative and anonymous group to resolve a complex problem. In an earlier article by Erffmeyer, Erffmeyer, and Lane (1986), the Delphi technique is attributed to Dalkey and Helmer for initiating the method in the early 1950s during an air force project. Hallowell and Gambatese (2010) noted that the Delphi technique is used to solicit the opinion of a panel of experts using surveys. This study also used a panel of experts anonymously.

### **Research Design**

There are two primary approaches for research design, including quantitative and qualitative, or they can be combined to form mixed methods. According to Crescenzi and Mainardi (2009), qualitative designs are used to answer questions that demonstrate a basic need

for understanding a topic. This study aimed to gain further understanding around PMO implementations and used a Delphi expert study as a qualitative research measure.

This study was aided by a survey tool, engaging participants in a four round Delphi study to solicit information from subject matter experts who have experience using change management processes as a component of PMO implementation. The research for this study used the responses of anonymous participants to better understand the role change management plays in successful PMO implementation.

The Delphi technique includes using a number of rounds in order to collect data from participants. Erffmeyer, Erffmeyer, and Lane (1986) stated that originally the Delphi technique used as many as four rounds, but this format has many variations amongst researchers. Bradley and Stewart (2003) noted in their Delphi study that a minimum of two and a maximum of six rounds were standard to compensate substantial findings. Hauck, Bayes, and Roberson (2012) used open-ended questions in a three round Delphi study to address the needs in the workplace of midwives. This study used open-ended questions in a four round study to capture information from 15 participants. While the number of rounds included in a Delphi study may vary, the process should remain the same.

According to Nworie (2011) the Delphi process begins with the first round, which introduced the panel to the question set forth to be answered by the study through the use of a questionnaire. Once the responses were received from round one, a questionnaire was constructed for round two to represent the most frequently occurring responses and allow the panel the opportunity to reconsider their responses from the previous round. Bradley and Stewart (2003) stated that the final round is used to provide the convergence of information and allow

panel members to agree or disagree. In this study, each participant engaged in a four round iterative data collection process that follows the same process.

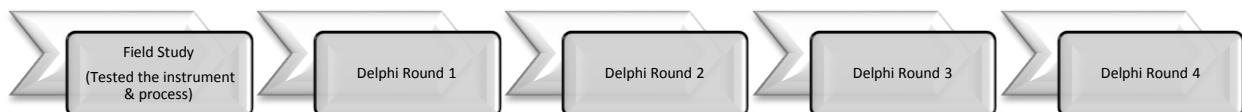
The initial question series for this study was presented in round one, as shown in Appendix A. The participants were asked to create a four-digit code to properly track questions against each participant's response. Demographic information was imperative to assess whether or not the participant qualified for the study, including years of experience and project management certification. According to Sumner, Bock, and Giamartino (2006), project manager characteristics, years of practice, and skills, along with certifications, can lend value to project success.

Each question was chosen based on the belief that change management processes were necessary for the success of a PMO implementation. Based on Kotter's (2005) change management model, questions were constructed in order to see if Kotter's processes were used and how project managers responsible for implementing PMOs experienced using change management specifically.

The questionnaire was posted on SurveyMonkey, which generated a link that could be shared with participants. The layout of the round one survey instrument is shown in Appendix A. After each round, data was collected from SurveyMonkey and downloaded into a Microsoft Excel (Excel) spreadsheet to be uploaded into Nvivo software for analysis. The information was analyzed using this software to determine the percentage of consensus as well as capture emerging themes.

This Delphi study included two phases, (a) a field test, and (b) four rounds of survey questionnaires, as shown in Figure 5. This study followed the steps of Clibbens, Walters, and Baird (2012) by creating a field test to assist in identifying any potential issues that could surface

during the study. Through the assessment and validity of the process and questions for round one, the study can show the dependability of the data. The field test was the first phase of the study and focused on testing the validity of the survey instrument itself. It also tested the ease of use of SurveyMonkey, the dissemination tool chosen for this study. The purpose of the field test was to use approximately five participants to ensure the process identified for the Delphi study would be adequate for the actual study. The participants were recruited using a detailed letter. The field study tested the first round of the study, as subsequent rounds are determined by the prior rounds.



*Figure 5. Delphi study research design*

The experts included a project management professional with 10 years of experience, a project and program management leader with over 20 years in project management, a PMO leader with PMP credentials and over 30 years' experience, a PMO Director with 20 years experience, and a certified project management professional with 6 Sigma certification and over 30 years' experience.

Each survey participant was provided a link to a SurveyMonkey survey and asked to review each of the proposed first round questions for the Delphi study and determine the following:

1. Whether the question was appropriate for the study population,
2. Whether the question will not cause participants unnecessary distress or discomfort,

3. Whether the question was clear and appropriately worded,
4. Whether the question was open-ended and in alignments with the overall research question in the proposed study.

Later each participant was asked to verify if the SurveyMonkey questionnaire was easy to use, had moderate ease of use, or was difficult to use. Three of the five participants responded that it was easy to use and two of the five participants did not respond at all.

The second phase of the study included the main Delphi study, which consisted of four rounds of questionnaires. Slevin and Sines (2000) stated in a study on qualitative methods that studies with specific criteria help to support trustworthiness in the study. This study identified specific criteria for selecting the participants, as well as criteria for collecting, documenting and analyzing data. The criteria used to select participants for the sample was the same that was used for the field test.

Each participant was provided an explanatory overview of how the process was intended to operate for each round. According to Hallowell and Gambatese (2010), a Delphi study includes two to six iterative rounds of questionnaires. The number of rounds a Delphi study includes is dependent upon the ability to gain consensus. Hallowell and Gambatese (2010) also noted in their study that the more rounds a study conducts, the less accurate the results. Based on this information, this study proposed a maximum of four rounds. Full consensus was evaluated after each round.

The researcher provided an anonymous synopsis of the participant's input from the previous survey as a part of the subsequent survey. In each succeeding round, participants were encouraged to review the anonymous responses of the other panel experts and consider

amending their thinking with regard to the research question. The objective of the process was to ultimately reduce the variations within the responses and accomplish overall consensus.

In the first round, questions were used that probed the experts to share the effective change management processes used in their experience when implementing successful PMOs. The purpose of round two was to provide all participants access to the responses of the other participants and encourage them to think freely, considering the thoughts of the other panel members. The third round repeated the same process described in the second round. The fourth round illustrated the emerging themes and requested the panel's thoughts on those themes. After each round the data was downloaded from SurveyMonkey, input into an Excel spreadsheet, and uploaded to the Nvivo software for further analysis.

### **Research Sample**

This researcher elected to use 15 participants, who were selected based on the following criteria:

- Must have at least 10 years experience as a project management professional.
- Must have PMP certification.
- Must have experience in successfully designing or implementing a PMO using change management with one or more similar processes found in Kotter's eight-step change model.
- Must have stayed with the company where the PMO implementation was conducted for at least three months post the implementation.

Participants are the cornerstone of a Delphi study, and Clayton (1997) proposed that if a study involves a homogenous population, 15 and 30 experts are sufficient, while 5-10 is necessary for a heterogeneous population. Since the focus of this study involved recruiting

project management professionals, the participation goal ranged between 15-30 participants. The panel for this study was selected based on criteria set forth to classify the participants as industry experts. Clayton (1997) defined experts as individuals with adequate knowledge and experience pertaining to the subject of the study.

Participants for this study were recruited using the professional social network site LinkedIn. The researcher used accessible personal emails to contact potential participants in order to make initial contact, prior to determining if each participant met the minimum requirements. Participants interested in the study, replied to the email and were given further information and asked additional questions to ensure that qualifications were met, and all interested understood the parameters of the study.

### **Role of the Researcher**

The role of the researcher was to act as an instrument to collect data for the purpose of the processes related to the study. The responsibility of the researcher also included designing and creating the questions for the survey tool. The researcher collected and analyzed the data submitted by the participants. In order to alleviate potential bias stemming from the researcher's past experience, the researcher approached the study with a renewed perspective and used bracketing, as described by Hays and Wood (2011), by allowing the interpretation of information through the eyes of the participants. For each of the Delphi rounds the researcher engaged analytical skills to aptly assess the data collected in order to construct questions for subsequent rounds of questioning.

### **Data Collection Methods**

The research question this study covered is the role that change management processes play in successful PMO implementation. In order to capture the demographics of each

participant, this information will be collected through pre-screening and a second time during the release of the first questionnaire. The data gathered is information that confirms each potential participant meets the predetermined criteria.

Questions were constructed and provided to participants to gain consensus in answering the research question. Each participant was provided the freedom to select the best environment to complete each questionnaire. As each participant completed the questionnaire, SurveyMonkey captured the responses and the date each participant completed the questionnaire. The data was downloaded from SurveyMonkey, organized and formatted displaying the questions and responses for each participant, and the percentage of participation for each question was determined.

The researcher maintained the integrity of the survey responses and the intention of the survey participants by using their exact words when creating the documentation for analysis and each round of the study. Once the information was imported into Nvivo for further analysis, words that were misspelled were corrected to provide a situation where word association analysis could properly be conducted. The information was validated through multiple checks to make sure the correct responses were captured for each question.

### **Data Analysis Methods**

Once the data is collected it will be analyzed. The data was organized and filtered based on the following:

- potential participants name and contact information
- criteria response information
- determination if potential participants meet the criteria
- speed of response

The process of compiling the results included first documenting all responses based on the four-digit code provided by each panel member. Each response option was either a narrative response or correlated by a statement. If the participant selected a specific statement, an “X” was marked in the column beneath the code of the respondent and next to the correlated statement or capital letter. After each response was recorded in the Excel spreadsheet, a tabulation of the results was completed.

After the data was collected, it was organized using codes to analyze information based on key elements and themes. Once the data was analyzed for key words and themes the responses were organized, documented, and used to prepare information for round two. The survey for round two included a synopsis of the themes and key points from round one and offered respondents an opportunity to review the responses of other participants. The second round offered participants an opportunity to revise their thinking based on the responses of other participants. Data analysis for questionnaires required a step-by-step procedure, as shown below:

- Round One
  - Step One: Exported the data from SurveyMonkey into Excel.
  - Step Two: Imported data from Excel into Nvivo.
  - Step Three: Determined the percentage rate of consensus for each question. The consensus rate for this study was 80%. When reviewing the responses from each participant the responses were compared and the level of agreement was determined. If the level of agreement was less than 80%, then a subsequent round was necessary to gain an acceptable percentage of consensuses. If one question gained consensus and other questions remained below the benchmark of 80%, an additional round was added.

- Step Four: Used the responses from the first round to determine the questions for the second round.

Rounds two and three were repeated with the goal of reaching an 80% consensus. Round Four followed the same steps, but instead of providing responses, participants review emerging themes.

Once the data is organized, each response was calculated to assess the percentage of consensus. In order to conduct an analysis, the responses were reviewed and coded for similarity and difference points. It was decided that if 80% consensus was not reached by the end of round three, emerging themes would be shared and responses would be collected and analyzed.

### **Ethical Considerations**

In regard to the researcher's competence, the researcher ensured proper knowledge was attained prior to engaging in the role as a researcher. The researcher understood the processes and policies of Capella, and the IRB, completed CITI training and adhered to the rules as set forth by the most recent version of the APA manual.

There were no concerns with ethical considerations for data collection. The process and questions for round one were tested to eliminate and defuse potential issues. The data was not falsified and all reports and information pertaining to the study were not modified. When conducting the field test, the questions for round one were reviewed for validity, suggestions from the panel were considered and the information regarding the field test was shared in the findings.

The researcher applied key principles from the Belmont report including respect for all people involved in the study and beneficence, which is the effort of minimizing the risk to each

of the participants; and ensured justice through making sure all of the procedures were followed in a fair and unbiased manner.

There is value and trustworthiness in a qualitative study. This study aimed to select a method that could provide access to an in-depth research approach. The researcher confirmed that each participant met criteria by verifying information that attested to their ability to qualify for the study. The research was judged on the basis of answering the research question of the role change management plays in successful PMO implementations.

This study engaged every precaution to ensure that it was valid and clear. Brod, Tesler, and Christensen (2009) suggested that validity within a study could be confirmed, if a researcher supplied as much information as was available, while also staying truthful during the entire study. The use of SurveyMonkey created a documented repository for all data collected, which automatically provided a reference point to ensure data was not modified or tampered with during the analysis phase. All information in the study was password protected and handled only by the researcher to avoid potential tampering or release of confidential information.

### **Summary**

The strengths of this study included the ability to use the knowledge and experience of experts to add knowledge to a growing field. The use of the qualitative method positioned growth not only in the design, but also in further analysis of how the Delphi technique could be an effective model. The Delphi method was selected because it created a platform where experts could come together anonymously to share their experiences in an open-ended discussion.

## **CHAPTER 4**

### **DATA COLLECTION AND ANALYSIS**

#### **Introduction**

The purpose of this study was to identify the role change management processes play in successful PMO implementations. This chapter will review the data collected in each of the four rounds of the study. The data will be presented using the number of each round in order to maintain clarity. In order to answer the primary and sub-questions posed, research participants were presented with seven survey questions, and research was conducted in the form of a Delphi study.

The first two questions requested each participant to select a four-digit code and provide demographic information. The remaining questions covered the core of the study. The third question, asked survey participants to select from a list of change management processes, identifying those processes used during successful PMO implementations. The fourth question sought to understand how change management processes influenced successful PMO implementations, while the fifth question involved understanding the impact that change management theories had on selecting those change management processes. The sixth question sought to understand the value added by employing change agents and how to prepare change agents for a PMO implementation. The seventh and final question asked for an explanation of how change was communicated and how training and mentoring were used to integrate the change into the organization. Moving forward, each round will be indicated by “R,” and the round number and questions within a round will be indicated by “Q” and the number of the question within the round.

A Delphi panel of PMO implementation professionals was used in order to answer the questions posed within the study. A seven-question survey was constructed and administered via a Web based survey tool, through SurveyMonkey.com. Each participant received an e-mail to communicate each round and the researcher's expectations for that round. The research process was comprised of four subsequent survey rounds, the goal of which was to reach consensus while further exploring the details around change management and successful PMO implementations.

### **Survey Introduction**

The round one survey was submitted to 30 survey participants via e-mail, which included a cover letter explaining the study and a link to the web-based survey. Following a two-week period, two declined due to inability to meet the minimum criteria, and sixteen completed the survey. This was a 53% response rate considering that two reminders were forwarded during the course of the two-week period. During the review of responses, one of the sixteen respondents did not meet the minimum criteria and was removed from the study after being notified.

### **Participant Consistency**

During the course of the study, there was a decline in participants with each round. Figure 6 shows the fluctuation in participants as the study progressed from round one to round four. Each round of the study began with a one week deadline, with the exception of round one which, was allotted two weeks to include an adjustment period. The researcher also provided an additional two-day extension once the deadline had passed if the original fifteen participants had not all responded. The researcher sent out reminder emails to each participant. Round one began with sixteen participants and Round two dropped to eleven participants. One participant contacted the researcher past the extended deadline for round two and was able to participate in

round three increasing the number to twelve participants. The fourth round of the study included nine participants, after a reminder e-mail and a two day extension.

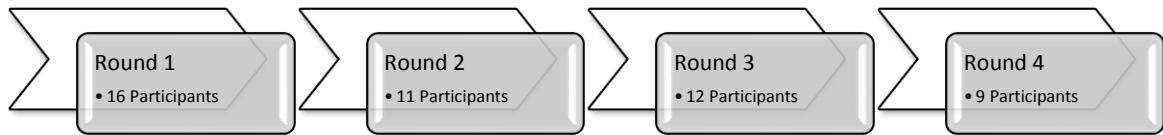


Figure 6. Participant Consistency

### **Demographic Data**

The initial survey was constructed to obtain information pertaining to the question of this study, as well as gather demographic data pertaining to the participants. The researcher also requested that each participant create a four-digit code to help in tracking responses moving forward. The participants consisted of one computer sciences professional, two in the field of education, two in electrical engineering, two in the field of general management, and seven in the field of project management.

The specific nine participants that were committed to the study from start to finish had a varied background. There were eight males and one female in the sample. All of the nine participants, except two had a minimum of a Master's degree level of education. Only two of the nine did not have specific project management licensing such as Prince or Project Management Professional certification and they all had successfully implemented a PMO using change management processes. The implementations were performed in diverse group of environments, including information technology, engineering, and computer sciences. There was a 100% qualification rate, as all of the original fifteen qualified as participants based on the criteria set forth, and all had over ten years of experience working in the field of project management.

## **Delphi Round One**

Round one survey used the five open-ended questions below to explore the panel's opinions and experiences regarding the role of change management in successful PMO implementations.

1. When successfully implementing a PMO using change management, which of the following processes were used? (Please select all that apply.)
  - a. Displayed or created a sense of urgency in the organization.
  - b. Formed a guiding coalition or a change management team.
  - c. Used a Change agent to lead the effort.
  - d. Constructed a vision or a plan for the change.
  - e. Communicated the vision for change.
  - f. Empowered the change.
  - g. Created short term goals that support making the change permanent.
  - h. Persistent in producing change.
  - i. Integrated changes into the company culture.
2. How do change management processes lend specific influences to the successful implementation of a PMO?
3. Express the impact of change theory on change management processes selected for use during a successful PMO implementation.
4. Describe an effective change agent in using change management processes for implementing a PMO and how can a change agent, as you have described, be prepared to lead a PMO implementation?

5. Explain the methods that are employed to communicate changes, as a result of the implementation, and how training and mentoring are instituted to integrate the changes into organizational culture.

In Round 1 Question 3 participants were asked to select which processes from Kotter's (2005) change model were used during successful PMO implementations. For Round 1 Question 3, the researcher documented the number of selections per option. For Round 1 Question 4 - Question 7, the narrative responses were compiled and documented in a spreadsheet to the corresponding question and code provided by the panel member.

Round 1 Question 3 from the survey instrument was presented as follows:

When successfully implementing a PMO using change management, which of the following processes were used? (Please select all that apply.)

1. Displayed or created a sense of urgency in the organization.
2. Formed a guiding coalition or a change management team.
3. Used a change agent to lead the effort.
4. Constructed a vision or a plan for the change.
5. Communicated the vision for change.
6. Empowered the change.
7. Created short term goals that support making the change permanent.
8. Persistent in producing change.
9. Integrated changes into the company culture.

Participants were not allowed the opportunity to insert their own change management processes used, because as mentioned previously during literature review, the theoretical

application of the study is based upon Kotter's eight-step model. Thus, they were bound to the nine as presented above.

Detailed analysis of the responses showed that there was favoritism shown for five out of the nine options, with an agreement percentage of at least 67%. Table 2 shows the response rate for each of the options for Round 1 Question3 as selected by the survey participants.

**Table 2**  
*Change Management Processes Results for Round One*

<b>Change Management Processes</b>	<b>Total</b>	<b>Frequency</b>
Communicated the vision for change.	15	100%
Constructed a vision or a plan for the change.	12	80%
Created short term goals that support making the change permanent.	12	80%
Integrated changes into the company culture	10	67%
Empowered the change.	10	67%
Formed a guiding coalition or a change management team.	10	67%
Displayed or created a sense of urgency in the organization.	9	60%
Persistent in producing change.	8	53%
Used a change agent to lead the effort.	7	47%

Participants were asked to select all change management processes that applied based on their usage of them during successful PMO implementations. Based on initial responses in round one, respondents had experience constructing and communicating the vision for change, as well as creating short-term goals that support the change. All three change management processes received an 80% or above frequency rate. This showed that based on the set consensus rate, three out of nine processes were frequently used during successful PMO implementations.

Round 1 Question 4 was an open-ended question that offered panel members an opportunity to create their own narrative responses. The survey panel was asked to explain how change management processes lend specific influences to successful PMO implementations. The

narrative provided in this open-ended question served to provide detailed feedback to the survey panel in subsequent Delphi rounds. The participants responded that change management processes were used to assist with resistance to change, connecting the change with the goals of the PMO, while also tying the change management processes into the current organizational processes to ensure consistency.

Some participants mentioned that they were unfamiliar with change theories but found value in using change management processes. They felt that change management needs to be tied to organizational culture and supported by leadership and most of the processes that they used came from experience and not a particular model. One participant, with over 35 years experience in project management and a project management certification, noted that “top management involvement is a key success factor,” while another stated that personnel needs to understand the change and that if personnel has a “role in both making change happen and in the new processes that are being created, they become more comfortable with what is happening.” Fourteen narrative responses were collected for use in the second round of the research process, as shown in Appendix B.

Round 1 Question 5 invited the participants to express their thoughts on the impact of change theory on change management processes selected during successful PMO implementations. Question 5 was presented as shown below:

Express the impact of change theory on change management processes selected for use during a successful PMO implementation.

Eleven narrative responses were gathered for use in the second round of the research process as shown in Appendix B, as some participants noted that they did not understand the question. After reaching out to four participants who responded in this capacity, the researcher

was capable of retrieving a response from one, which created a total of eleven responses. When submitting the response back to the participants in round two, those who stated lack of understanding were omitted.

One participant responded that Kotter's model was used to assist in the selection of change management processes, while others stated that change management processes were not linked to theories or models but to the needs of the organizations based on previously set goals as they related to the implementation. The commonality in the responses was that there was no specific tie to the use of change management models.

Round 1 Question 6 asked participants to describe an effective change agent and to also discuss how a change agent could be prepared to lead a successful PMO implementation.

Question 6 was presented as shown below:

Describe an effective change agent in using change management processes for implementing a PMO and how can a change agent, as you have described, be prepared to lead a PMO implementation?

The participants used experience to share personality traits of successful change agents. Some characteristics that were listed included the following:

- good communicator and effectively explains the change
- good leader
- understands the PMO
- understands challenges and issues
- persuasive
- committed to the change

Participants also shared that change agents could be current resources holding leadership positions. It was also documented that the change agent should be knowledgeable and understand the change efforts thoroughly enough to understand how to communicate and lead the effort. Along with persuasiveness, participants noted that change agents should be motivators and capable of getting non-believers on board with the change through the ability to manage the resistance to the change. Fourteen narrative responses were gathered for use in the second round of the research process, as shown in Appendix B.

Round 1 Question 7 requested that the participants explain methods used in order to communicate changes that result from the implementation and to discuss how training and mentoring are used to integrate the change into the organization. Question 7 was presented as shown below:

Explain the methods that are employed to communicate changes, as a result of the implementation, and how training and mentoring are instituted to integrate the changes into organizational culture.

One of the more lengthy responses explained that communication should first begin with understanding the goals of the implementation prior to organizing communication efforts. Other responses explained the need to identify communication vehicles, communication strategy, and communication audiences as a part of the methods that should be employed for sharing the change with the organization. Fifteen narrative responses were gathered for use in the second round of the research process, as shown in Appendix B.

As a component of the round one survey feedback provided to the panel members, the researcher also provided responses gathered on the open-ended questions. Responses to Questions 4 through 7 were copied, as is, and pasted in the return document prepared for the

survey panel. To ensure anonymity of the Delphi process, all participants' answers were assigned a letter in the alphabet, with no letter directly mapping back to answers from the same panel member. To ensure integrity of the survey, the panel members' exact responses were provided in the documents provided to panel members for round two.

### **Delphi Round Two**

At the start of round two, participants were asked to use the provided responses from the round one survey, in order to respond to round two of the study. The participants were also given a one-week deadline to respond.

The round two survey displayed in Appendix C included six questions that focused primarily on capturing feedback on the primary and sub-questions of the study. In Round 2 Question 2 the panel members were given the top five selected change management processes used during successful PMO implementation as documented in round one. Participants were asked to select the top three that most resonated with their experience. The results are shown in Table 3 based on the responses from eleven participants.

Table 3  
*Change Management Processes Results for Round Two*

<b>Change Management Processes</b>	<b>Total</b>	<b>Frequency</b>
Constructed a vision or a plan for the change.	10	90.90%
Communicated the vision for change.	9	81.80%
Created short term goals that support making the change permanent.	7	63.60%
Integrated changes into the company culture.	6	54.50%
Empowered the change.	1	9.10%

In round one consensus was met on three of the nine change management processes presented, and the researcher wanted to narrow the consensus down to the top two processes

selected by participants to determine if the participants had a preference between creating goals and communicating the vision.

Consensus was met on two of the five processes presented within the question. This question was not presented in round three because consensus was met on communicating a vision for a change and constructing a vision or a plan for a change. These were selected as the top processes used when successfully implementing a PMO.

Round 2 Question 3 requested that each participant review all responses and select the five that most accurately reflected their experience with regards to the following question:

How do change management processes lend specific influences to the successful implementation of a PMO?

The results are shown in Table 4. The most favored of the five was the concept of developing a roadmap to tie into goals of the organization and then using that roadmap as a communication tool.

Others that showed a high level of favoritism encouraged the use of change management processes and connecting them with goals and also explaining why the changes are necessary.

Table 4  
*Top five explanations for Round Two, Question Three*

<b>Response</b>	<b>Frequency</b>
Developing a roadmap to implement the PMO including vision, creating a proper process of communication and setting goals for the short, medium and long term, development of training program. All of these elements really helped in PMO implementation.	<b>72.70%</b>
Like any major alteration to a company's habits and norms, it takes an organized, coherent and consistent plan to implement and integrate a new methodology or way of doing business into an established business	<b>63.60%</b>
Change management helps to overcome resistance to change. Fear of the unknown is the greatest obstacle and effective change management assures personnel of their own role in the new reality.	<b>54.50%</b>
Change management processes and goals that are based on the mission/vision and goals of the PMO are much more successful. The executive leadership of the organization in which the PMO exists must develop these and evangelize them throughout the organization. This must be a consistent, on-going activity. Creating a sense of urgency provides motivation throughout the organization. A change management should have the active involvement of the executive leadership team, at a minimum, the very obvious backing of executive leadership. A vision and plan for change management based on the mission/vision and goals of the PMO provides a road map for change. Short term goals and phased implementation prevent the organization from being overwhelmed by too much change in too short a period.	<b>54.50%</b>
We needed to map the changes from current processes (where they existed) and new processes for communication to the organization along with explanations of why the changes were being made and the advantages to be gained. We used communication of the changes in advance and provided job aids and documentation in addition to hands-on training. We also employed existing tools for minimal impact to desktops and integration with existing infrastructure. This facilitated acceptance and usage.	<b>54.50%</b>

Based on the responses from eleven participants, five out of fourteen responses gained at least a 54.5% and a maximum of 72.7% frequency selection from participants. Based on

parameters set forth by this study, the consensus was not met on this question, and the researcher was prepared to present it again for round three of the study.

Round 2 Question 4 asked participants to review the survey responses and select the top five responses that most accurately reflected their viewpoint on the following topic:

Express the impact of change theory on change management processes selected for use during a successful PMO implementation.

After reviewing the responses only four of the twelve options had a frequency of 54.5% or above, and thus the top four were selected for further analysis. The results of the top four responses are shown in Table 5.

**Table 5**  
*Top four explanations for Round Two, Question Four*

<b>Response</b>	<b>Frequency</b>
When personnel understand that they have a role in both making change happen and in the new processes that are being created, they become more comfortable with what is happening.	<b>72.70%</b>
Change management needs to be tied to organizational culture.	<b>63.60%</b>
The selections I made were based on my prior experiences, practical knowledge, gained through multiple PMO implementations.	<b>63.60%</b>
I think it is important to have a good theory on change management. The difficulty however, is how to implement it in an organization. Each organization is different, has a different culture, different people, etc. I think you should use a pragmatic approach and be flexible. However, the end result should be clear from the beginning, and modifications should be limited in number.	<b>54.50%</b>

The most popular response was one that neglected to mention change theory at all, but actually incorporating the employees into the processes. The response that spoke to selecting a

good theory and implementing that theory received the lowest consensus, and coincides with the low response rate from round one, where participants rarely mentioned a change model.

Based on the responses from eleven panel members, there were three selections that had at least a 54.5% frequency of selection from participants. The favored among the top four was the idea that once change is understood, change management processes could actually be created. Based on parameters set forth by this study, the consensus was not met on this question and was repeated in round three.

Round 2 Question 5 asked participants to review the survey responses and select the top five that most accurately reflected their viewpoint on the following question:

Describe an effective change agent in using change management processes for implementing a PMO and how can a change agent, as you have described, be prepared to lead a PMO implementation?

The respondents favored two of the fourteen with 81.8% frequency, but the top four are shown in Table 6 with a frequency of at least 54.5%.

Table 6  
*Top four explanations for Round Two, Question Five*

<b>Response</b>	<b>Frequency</b>
Active listening is the key characteristic of an effective change agent. Unless and until the inputs of team personnel are incorporated in the change plan, resistance will outweigh team objectives. Leading, then, is expressing curiosity and appreciation for new information and direction.	<b>81.8%</b>
An effective change agent must understand the project related issues and challenges the business is facing. This change agent must be knowledgeable about the problems and challenges of the business and why the PMO has come into existence. With a clear and consensual understanding of why the executive leadership has identified a need for a PMO and what problems the PMO exists to address, the change agent can more effectively lead change. An effective change agent needs to understand the current culture of the organization.	<b>81.8%</b>
A change agent is required to be able to effectively explain the change, the benefits of the change and the process to implement the change to all affected groups in the organization. The change agent will be required to identify required phases of the implementation and communicate these effectively to all groups.	<b>54.5%</b>
Communication, commitment, vision, ability to motivate, involvement are all critical when it comes to using a change agent.	<b>54.5%</b>

The participants agreed that effective change agents are active listeners, curious, and appreciative of the new direction. They incorporate the inputs of the team personnel into the change plan. They also understand issues and challenges related to the project, the company's culture and the identified need for the PMO. Throughout the responses for round one and round two there was consistency in the responses around what characteristics were fit for a change agent, and most of them focused on knowledge, understanding and good communication skills.

Round 2 Question 6 asked participants to review the survey responses and select the top five responses to the following topic:

Explain the methods that are employed to communicate changes, as a result of the implementation, and how training and mentoring are instituted to integrate the changes into organizational culture.

Eleven participants responded to the question and selected the top five that most resonated with their viewpoint. The top four responses are shown in Table 7. After reviewing the responses, only four of the twelve options had a frequency of 54.5% or above, and thus the top four were selected for further analysis.

Table 7  
*Top four explanations for Round Two, Question Six*

Response	Frequency
Communication must begin very early in the planning phase and should occur, to the extent possible, in team settings. This permits those affected to comprehend how the change plan is constructed and how it is to be implemented.	<b>63.6%</b>
A PMO should have a communication plan. Any new processes rolled out should have a communication plan. A basic approach would be to have previews or pre-announcements, followed by 'coming soon' announcements, followed by visiting individual groups or department meetings for review and discussion and questions. When it is time to roll out the new approach aside from conducting training sessions, you might also partner coordinators with various groups so that each group has someone to help them and give them personalized changes.	<b>63.6%</b>
Communication plan, clear vision, "what's-in-it-for-me", positive elements, risk management	<b>54.5%</b>

One of the least favored responses was very short and ambiguous, while the other was long and focused heavily on where the communication should originate. The responses that were most favored mentioned developing a communication plan early on and administering meetings

to share communication regarding the change. Based on the responses from eleven panel members, there were four selections that had at least a 54.5% frequency from selection participants. Based on parameters set forth by this study, the consensus was not met on this question and it was repeated in round three.

### **Delphi Round Three**

The round three survey shown in Appendix D included three questions that focused primarily on narrowing down the thoughts of participants based on top responses from round two of questions that did not reach consensus. In the first core question of the survey, the panel members were given the top five selected narrative responses, as shown in Table 4, regarding the influence of change management processes on successful PMO implementation as documented in round two. Participants were asked to select the top two that most resonated with their experience.

The frequency results are shown in Appendix F based on the responses from twelve out of fifteen participants. Based on the twelve responses there was one narrative that received the highest frequency, which was 75%. The response with 75% consensus was a response that had more content than the others, encompassing most of the points from all responses into one. It stated that change management processes should be linked to goals and these processes should be consistent and supported throughout the organization by leadership. The original response that received the highest frequency in round two which spoke to developing a roadmap dropped from 72.7% to 33.3% in round three. The more popular response did not incorporate the term *roadmap*, but it did cover the concept of creating short-term goals to help lessen the feeling of being overwhelmed.

Round 3 Question 3 asked participants to select the best one of three narratives on the impact of change theory when selecting change management processes. Out of the three narratives presented to the participants, one received a response frequency of 50% while the other two received 25% from twelve respondents as shown in Appendix G.

While the survey was split, not providing consensus on one response, the participants favored the same response in round three as they did in round two with regards to the company making sure the employees play a role in the change and not necessarily focusing on a model from which processes should be pulled.

Round 3 Question 4 referenced the description of methods used to communicate change and the use of training and mentoring when integrating changes into the organization. The participants were asked to select the top two out of four based on the responses retrieved from Round Two. One of the four responses received a 75% frequency rate from twelve responses.

There was a second ranking narrative with 66.7% frequency of response from participants. Interestingly, the concept that communication must begin early in the planning phase and in a team setting, received the lowest response rate of all options. These results are shown in Table 8.

Table 8  
*Round three frequency for description of methods use to communicate change and train and mentor*

<b>Response</b>	<b>Frequency</b>
Work with the constituents of the PMO, the executive leadership team, to determine a unanimously agreed to business purpose, vision, and mission for the PMO, their PMO. And based upon this vision and mission, an actionable set of PMO goals will also be consensually agreed to. And, each goal will be further defined and agreed to in terms of measurable objectives that specify the how much and by when of that which is to be accomplished. The mission/vision, goals and objectives are communicated to the organization. This communication will demonstrate how the goals and objectives are tied the goals, objectives, and strategy of the organization. These communication efforts will employ the "WIIFM" principle (what's in it for me). Communication efforts will vary based on the culture of the organization, the capabilities of the organization, the size organization, the geography and other factors. Whenever possible face to face communication should be employed, meetings, presentations, video conferencing can be used. In large organizations, webinars, seminars, and classroom training can be effective methods of training. Mentoring can be effective in some organizations if the conditions and culture are right. However, effective mentoring is focused with specific objectives in mind.	<b>75%</b>
A PMO should have a communication plan. Any new processes rolled out should have a communication plan. A basic approach would be to have previews or pre-announcements, followed by 'coming soon' announcements, followed by visiting individual groups or department meetings for review and discussion and questions. When it is time to roll out the new approach aside from conducting training sessions, you might also partner coordinators with various groups so that each group has someone to help them and give them personalized changes.	<b>66.7%</b>
Communication plan, clear vision, "what's-in-it-for-me", positive elements, risk management	<b>25%</b>
Communication must begin very early in the planning phase and should occur, to the extent possible, in team settings. This permits those affected to comprehend how the change plan is constructed and how it is to be implemented.	<b>33.3%</b>

The participants favored a more lengthy explanation regarding communicating change in round three as opposed to round two where the same response received a 54.5%; but when given fewer options, incorporating where the communication came from appeared to be more important than just simply planning the communication. The favored response also stated that “communication efforts will vary based on the culture of the organization,” while it discussed the different channels of communication that could be successful.

Although a consensus was not reached on two of the original five questions, the study transitioned to round four and used the high agreement frequency levels to determine emerging themes.

### **Emerging Themes**

All responses to each of the five original questions in round one were documented, reviewed and analyzed. The researcher used the response frequency to aid in determining which responses were emerging themes. Communication of the vision and constructing a vision or plan for the change were the top two responses to the first question which asked each participant to review nine change management processes and select those that were used during a successful PMO implementation. These processes were chosen in both round one and round two as favorites, which emphasized that these are definitely processes that experts agree are substantive in PMO success.

When asked to explain how change management processes lend specific influences to the successful implementation of a PMO, participants responded with the emerging themes that change management processes and goals that are based on the mission/vision and goals of the PMO are much more successful. One respondent wrote that “the executive leadership of the organization in which the PMO exists must develop these and evangelize them throughout the

organization.” It was clear that the involvement of leadership must be a consistent, on-going activity. Creating a sense of urgency provides motivation throughout the organization. A change management should have the active involvement of the executive leadership team, or, at a minimum, the very obvious backing of executive leadership. A vision and plan for change management based on the mission/vision and goals of the PMO provides a road map for change. Short-term goals and phased implementation prevent the organization from being overwhelmed by too much change in too short a period.

When asked to explain the impact of change theory on change management processes selected for use during a successful PMO implementation, participants responded with the emerging theme that change management needs to be tied to organizational culture. When asked to describe an effective change agent and how a change agent can be prepared to lead a PMO implementation, participants responded with the emerging theme that effective change agents are active listeners, curious and appreciative of the new direction. They incorporate the inputs of the team personnel into the change plan. They also understand issues and challenges related to the project, the company’s culture and the identified need for the PMO.

When asked to describe methods that are employed to communicate changes, as a result of the implementation, and how training and mentoring are instituted to integrate the changes into organizational culture, participants replied with the emerging themes that it’s necessary to work with leadership, define goals, design and employ an effective communication plan that includes communicating the goals, conduct training sessions, and partner coordinators with various groups to assist with changes.

Based on the analysis and findings in the emerging themes round four was created to get feedback from participants on their thoughts surrounding the emerging themes and collect the final data for the study.

The top two responses when asked what processes were used during successful PMO implementation were communicating the vision and constructing a vision or plan for the change. The emerging themes for influences on successful PMO implementations were support from leadership and connectivity to the change. Most participants did not believe there was a necessary impact of change theory on determining what change management processes were selected. Participants decided that specific skill and characteristics are needed to be effective in their role of leading the change. Finally, the emerging themes for communicating the change and training and mentoring those impacted are the creation of efficient plans, followed by training sessions and mentoring partnerships.

#### **Delphi Round Four**

In order to understand the role change management plays in successful PMO implementations the responses to round three were constructed into emerging themes and presented to participants in the round four questionnaire. The survey instrument used for round four is shown in Appendix I and results to round four are shown in Appendix I.

Participants were asked to review the question, along with the emerging themes and communicate what their responses were to the themes as well as explain what the themes told them about each topic. After nine days, nine participants responded to the round four study and provided their feedback regarding emerging themes.

## **Emerging Themes for Top Processes**

The top two responses when asked what processes were used during successful PMO implementations were communicating the vision and constructing a vision or plan for the change. The participants noted that this showed how important it is not only to understand the vision, but also that the communication of the vision must be clear and understandable. One participant, with a Ph.D. in organizational management and twenty years of project management experience stated that “organizational culture is medullar in any PMO implementation and [change management] needs to be aligned to it in order to become efficient.” The plan or the vision can help illustrate management’s connection to the project and the level of interest they have in the implementation. The responses also shared that the emerging themes were proof that change management is necessary for the success of the PMO implementation.

When reviewing the responses over the first two rounds of the study, it remained consistent that they were the top two favorites of the participant group, and in the end the participants believed that communication and planning were core processes within change management that made the implementation successful.

## **Emerging Themes for Influences on Successful PMO Implementations**

Next, respondents provided feedback on the emerging themes of how change management processes lend specific influences to successful PMO implementations. The responses focused heavily on the importance of executive leadership to support the change. The support of an organization’s leadership team, provides an opportunity to get others engaged to help rally the effort. Participants also responded that the change management processes create a relationship with representatives of the organization to be connected to the implementation, thus supporting and assisting in the implementation in a positive manner.

## **Emerging Themes for the Impact of Change Theory on Change Management Processes**

The emerging theme on the impact of change theory on change management processes selected for use during a successful PMO implementation was that change theory is based upon organizational culture and the tie to the culture imposes the impact on which change management processes are selected. The participants had a strong response to organizational culture driving the change management efforts both positively and negatively. It was stated that knowing what processes or theory to follow meant understanding organizational culture and employee attitude towards organizational culture.

## **Emerging Themes for Effective Change Agents**

Next respondents were asked to respond to the emerging theme that effective change agents were active listeners, curious and appreciative of the new direction, and that it is important they incorporate the inputs of the team personnel into the change plan, understand issues and challenges related to the project, the company's culture, and the identified need for the PMO. Participants responded by asserting that it was necessary for change agents to possess certain qualities such as patience, humility, and the ability to encourage others. Participants also noted that it was important for change agents to believe in the change and completely own their leadership role while ensuring there was alignment to organizational goals.

During the analysis of the responses on effective change agents it was repeatedly mentioned that it is important that change agents are good listeners, collaborative, and efficient communicators of the change. According to the participants, it is the duty of a change agent to be the champion for the change as well as exhibit qualities of an adaptive attitude and always being aware of the constant changes that are promoted by management. The agent must understand the major areas of impact to manage as well as maintain the integrity of the

implementation so that its reputation does not falter in the eyes of the employees or the organization.

### **Emerging Themes for Communication, Training and Mentoring**

Finally participants were asked to respond to the emerging themes that communication started with understanding the goals and collaboration with leadership. Also, it was necessary to conduct training sessions, and partner change coordinators with various groups to assist with integrating the changes into organizational culture. Participants responded by stating that communication, training and the partnering of coordinators need to be tied into organizational culture when creating a plan of execution. It was noted that having the coordinators for change lead the effort of communication or training would be the most successful approach and also to place a time limit on adaptation which allows an opportunity for everyone to come on board to the change.

In addition, participants thought that communicating the goals effectively meant revising the goals and providing continuous status on the change, even after implementation. This maintains the connection to employees and allows them to remain adapted and contiguously connected to the change. Participants noted that through discovering the importance of communication, it was also found that there is a level of necessity involved when determining the vehicles used to handle the communication.

### **Summary**

Chapter 4 presented the results of the four rounds of the Delphi study. Each round of the study was conducted using an online survey questionnaire through SurveyMonkey. The demographic data presented a diverse range of industries, where PMOs were successfully implemented and the expert panel all had at least 10 years of industry experience. The analysis

of the data resulted in two of the five questions meeting a consensus, while three of the five questions failed to meet consensus of 80% or more.

Consensus on the two questions occurred very early on in round two while the remaining three questions resulted in a struggle to gain consensus, as participants bounced back and forth from what was most important with regard to change management. When given lesser options, participants tended to change their responses in terms of what was more common in successful PMO implementations.

The questions that immediately satisfied the minimum for consensus were the identification of the processes used during successful PMO implementation and the description of an effective change agent. Participants, however, did not seem to agree on how change management processes lend specific influences to successful PMO implementations, as the favorites wavered between the use of roadmaps and the idea of connecting goals to the overall change. In the end, a higher frequency of agreement was tied to the idea that having a vision, plans and short-term goals were those specific activities that led to successful PMO implementations.

The final question that did not receive an 80% or higher consensus rate was the methods used to communicate change. Based on the four options available, the participants appeared to split between two selections that offered detail around communication being driven by a plan and training employees through the use of different vehicles in order to be a success.

The participants also refused to elect a specific change theory as being responsible for the success of PMO implementation. Only one was mentioned during the round one response and as the study progressed, participants continued to agree that it was more important to tie change management processes to organizational culture as opposed to change theory.

Once emerging themes were presented and responses were analyzed, it was determined while consensus was not met on all of the questions, participants shared the same views on the emerging themes and supported the thought that change management processes are contributing factors in successful PMO implementations. Respondents made a connection between change theory's impact on selected change management processes and organizational culture and concluded that culture ultimately determines what processes are imperative. Participants saw the value in change management processes and the use of change agents and agreed that effective communication and training were necessary and a component of what made the implementation a success.

Chapter 5 will present the study's conclusions and recommendations based on the analysis conducted in Chapter 4.

## **CHAPTER 5**

### **RESULTS, CONCLUSIONS, AND RECOMMENDATIONS**

#### **Introduction**

This chapter provides a summary and discussion of the findings as presented in Chapter 4; delivers a summary of those findings; and includes implications, recommendations and conclusions. This chapter also provides a detailed presentation of emerging themes. The purpose of this study was to gain consensus from 15 PMO industry experts regarding the role that change management processes play in successful PMO implementations. After reviewing the literature a related article by Singh et al., 2009, was found that aimed at trying to understand PMO implementations through the review of variables that caused them to be unsuccessful. That study concluded with the need for further research and this study was designed to focus on the spectrum that covered what made the implementations successful. PMOs sometimes survive installation, while other times the PMO is dismantled, shortly after its inception. Change management has been employed and actively visible during successful implementations leading experts to believe that it plays a role when things go well.

The data gathered in this study provides additional knowledge on the subject of PMO implementations. Spelta and Albertin (2012) noted that PMOs must have a successful implementation if the PMO as an entity is expected to attain goals of success. The goal of this study was to understand what change management processes were used when organizations successfully implemented PMOs. The study was conducted using a four-round, web-based, survey during the month of June 2013. Fifteen industry experts were asked to provide their thoughts based on their experiences in implementing PMOs. During the first three rounds of the study, data was collected and analyzed and returned to participants with the goal of attaining

80% consensus. After the third round had been completed, emerging themes were presented to the participants to request feedback regarding their thoughts on the findings. This chapter also covers the study's delimitations and limitation effects, including implications and suggestion for future research.

### **Summary of Findings**

This study was developed around the concept that there are many facets involved when a PMO implementation is successful and the question of whether change management processes were involved at some point during successful implementation. The researcher wanted to first expose those processes that were most likely linked to successful implementations and then used the panel experts to determine consensus. In order to position the study to gather feedback regarding the processes, a primary question and four sub-questions were prepared as shown below:

Primary question: What is the role that experts believe change management processes play in the successful implementation of a PMO?

Sub-questions:

1. How do particular change management models serve PMO implementation?
2. What value, if any, does a change agent add to the change management process of implementing a PMO?
3. When implementing a PMO office, how is change management introduced to the organization and incepted into its culture?
4. How does the theoretical foundation of change management drive selected processes to be used during PMO implementation?

This study found that change management is ingrained in the processes of PMO implementations even if not readily recognizable by those leading the effort. Once defined it can be shown that change management exists within the decisions of how the implementation will be executed. This is good news because as stated by Glueck (1969) whenever transformation is present, it is necessary to also involve change management. It was affirmed during this study that change management indeed makes a difference in the success of PMO implementations.

Change management processes highlighted in the study were all used to some extent with regard to the PMO implementation and were highlighted by the Delphi panel as advantageous. According to the panel, the use of the change management processes played a role in those implementations that were considered successful. The process of selecting the proper change management processes depends on the needs of the organization, the goals of the PMO implementation, and how the change agent or the individual in charge of the implementation decides to lead the effort.

This Delphi study was able to gain consensus on two of the five discussion points regarding change management processes used during successful PMO implementations. While the study did not gain consensus on all the practices of how things were done in the study, it did reveal that change management processes were used when PMO implementation were considered successful.

In order to ask experts what they believed to be the role of change management processes in successful PMO implementations, the processes had to first be identified. This was completed by using Kotter's eight-step model to drive out potential processes used during the implementation of a PMO. Next, the researcher aimed to understand how models such as Kotter's guide the selection of the change management processes. The researcher wanted to

understand if these processes were selected based on change management models, or if change leaders made them up on their own. The researcher aimed to gather more information around the historical preface of change management and how that history drove specific processes to be selected as opposed to others.

Kotter's (2005) model suggested it is necessary to build a coalition when managing change efforts. In order to learn more about this, the researcher wanted to understand the characteristics of an effective change agent. The first question surrounding change agents was the degree of value they offered, if any, and once the change agents were selected, the researcher wanted to determine what type of preparation was necessary to make sure the agent was properly prepared and positioned for success.

Finally, the researcher aimed to understand further how change management was introduced into an organization once a decision was made by a company to use the selected processes. It was important to identify if organizations forced changes, communicated changes, or if the employees were left to interpret the changes on their own. The second piece of change management inception into organizations was the ties to its culture. The researcher explored through the same question, the effect of change management processes on organizational culture and the best ways to integrate it with current traditions. It was important to understand whether the changes brought on by the implementation were impacting culture and how the organization prepared overall for the influences of the change.

### **Emerging Themes**

After four iterative rounds of the Delphi method, the expert panel came to consensus on two of the five points regarding the relationship of change management and success in PMO implementations. The emerging themes that evolved from the responses to each of the five

questions were integrated into the best change management processes selected for implementation and the best use for change management attributes that positively impacted the PMO implementations.

### **Constructing and Communicating the Vision**

The first question of the Round One study asked participants to review nine change management processes and select all of those used when they successfully implemented a PMO. The nine options are listed below and there was no limit to the number that could be selected by each participant.

1. Displayed or created a sense of urgency in the organization.
2. Formed a guiding coalition or a change management team.
3. Used a change agent to lead the effort.
4. Constructed a vision or a plan for the change.
5. Communicated the vision for change.
6. Empowered the change.
7. Created short term goals that support making the change permanent.
8. Persistent in producing change.
9. Integrated changes into the company culture.

The data revealed that not all processes had been used by everyone, but there were a few that were used by all of the respondents. The three processes that stood out in Round One were constructing a vision for the change, communicating the change and integrating the changes into the company culture.

Even though 93% of the participants indicated they communicated the vision for the change, only 80% noted that they actually constructed a vision or a plan for the change. Thus, those visions that were communicated may or may not have come from a formal plan created for the purpose of sharing the change with the organization. This information shows that there could possibly be a gap that exists between planning for communication and executing communication efforts.

Later the participants were asked to pick their top three out of the top five processes used, and once the data was analyzed, it was found that constructing a vision for the change and communicating the change remained at the top. The data, a consensus of more than 80%, revealed that planning and communicating a vision were the two processes that the panel found to be present during successful PMO implementations.

There appears to be a connection between change management processes and PMO implementation success. Identifying the PMO as a change is the first step in understanding that change management processes could be beneficial. Next, it is important to have a plan and a vision for the change and to use multiple vehicles to communicate not only the vision but also the change as it manifest from an idea to something real.

### **Connection of Change Management Processes to Company Missions and Goals**

Participants provided specific thoughts on how they believed change management processes influenced successful PMO implementations. There was continued support expressed in the use of change management. The responses also led to explain how change management helped to position organization for successful PMO implementation. When asked to explain how change management processes lend specific influences to the successful implementation of a PMO, the emerging themes in the responses were that change management processes and goals

that are based on the mission/vision and goals of the PMO are much more successful. This theme draws a distinct connection to the first emerged theme, that constructing a vision is necessary.

Participants communicated that processes that offered an opportunity for organizations to identify goals and visions were the change management processes that influenced successful PMO implementations. It was also noted that change management processes that focused on allowing leadership to remain involved, were healthy process selections as well. Processes that involved allowing leadership to embrace the change and assist in the change effort were processes that participants believed led to successful PMO implementations.

Responses to the questions showed favor in executive leadership of the organization in which the PMO exists becoming involved in the process, beginning with the development of goals and leading the change throughout the organization. It was stated that even if someone from the leadership team was not selected as an agent, he or she must be consistently involved in the on-going activity brought on by the change. Newman (2012) noted that in order for sustainability to exist after a change, there must be visible commitment from leadership.

This study found that specific influences of change management processes on successful PMO implementations included those processes that encourage creating a roadmap for the change and involving leadership in change efforts from start to finish. Nelissen and Van Selm (2008) stated that the ways in which communication is delivered from management can hugely impact the employee's response to change.

The selected change management processes that most effectively influence successful PMO implementation are those that have a vision and plan for change management based on the mission and goals of the PMO and the continuous active involvement of the executive leadership team who aides in communicating the road map for change.

## **Change Management and Its Ties to Organizational Culture**

When Kotter's eight-step model was selected for the foundation of change management theory to be used in this study, it was important to understand what role theory played in the processes that were elected for use during successful PMO implementations. There was a low level of frequency when aiming to gain consensus on this topic as many of the participants admitted that change theory was not a huge focus, but believed that the theory or processes selected were hugely driven by the culture of the organization owning the implementation.

The emerging theme for the impact of change theory on change management processes selected for use during a successful PMO implementation was that change management needs to be tied to organizational culture. Participants did not refer to the use of Kotter, Lewin or others who had specifically designed models of change management, but the focus was on the use of processes that complemented the organizational culture, despite their origin.

This emerging theme also suggested the possibility that there may be a need to develop new change management processes depending on the goals of the company. Thus it appears that there is little influence by change management models regarding selected change management processes. In this area there appears to be more consideration needed in order to make a more efficient claim to theory.

It may be considered that it is necessary to conduct research to determine if a specific theory is appropriate for a specific PMO implementation. Among the theories that are in circulation, each has different processes within the model. According to Hudescu and Ilies (2011), when considering what change management theory to use during an organizational transformation, the company must consider the degree, timing, scale and intention of change,

among other things. Focusing on change from a holistic perspective will not provide enough visibility to make the best decision.

When Kotter's model was selected for this study, it was based on its ability to include enough processes that were relatable to what the literature had noted as effective change management processes. However, it is possible that the use of a specific theory, as opposed to specifically selected processes with no regard to theory or model, but to organizational culture would end in successful results.

### **Knowledgeable Change Agents Support the Change**

This study had a goal of understanding how to select a change agent that would be effective when leading change efforts for PMO implementation. First, the researcher determined how many of the participants used change agents during successful PMO implementations. When responding to what change management processes were used 47% of the participants indicated that a change agent had been used during successful implementations.

Later, the respondents were asked to describe an effective change agent and explain how that change agent could be prepared to lead a successful PMO implementation. This question did not cover whether or not a change agent was necessary. Participant responses led to a consensus that supported that effective change agents are active listeners, curious and appreciative of the new direction, while incorporating feedback from team members and understanding and responding to issues and challenges related to the project, the company's culture, and the identified need for the PMO.

While less than half of the participants stated that a change agent had been used during the successful implementation of a PMO, they were able to come to a consensus on the description of a change agent that would be capable of leading a successful implementation.

While there are PMO implementation leaders, executive leaders, and champions for change, there is still a possibility that none of these collectively handle the responsibility of a change agent.

Birkinshaw et al., 2008 noted that change agents can actually be recruited from outside the organization. Thus, if a PMO implementation leader or executive leader is responsible for recruiting this individual, it would be helpful to understand what qualities to require when making a selection. Mitchell (2013) focused on the traits of effective change agents and found that it was essential for leadership also to begin to acquire the same qualities as those found in effective change agents.

Possessing certain traits and qualities, along with specified skill sets, as noted by the organization owning the change can make for a good change agent. Whether internal or external to an organization it is important that these agents are good communicators, active listeners, and capable of leading the change from start to finish, despite support from the rest of the organization.

### **Connecting Communication, Training and Mentoring to Organizational Goals**

Once an organization makes the decision to move forward with an implementation, it must consider what changes will occur based on this change. The next step is to then communicate the change in the most efficient manner. Communication, as learned early in the study, is an important tool used from the beginning of the implementation until well after it has completed, because impacts from the change can continue even after the implementation is in place.

Communication of the change was selected as one of the top processes used during successful PMO implementation, and it was discovered again during the respondents' discussion

of influences of change management processes on successful implementations, effective change agents, and again during the integration of change into the culture of the organization. Based on the responses, it is clear that communication is definitely a tool of importance.

In an article by Husain (2013) effective communication was covered in regard to proven strategy in change management. The article noted that there are not only multiple ways in which communication can be shared, but there should also be a devised strategy for how communication is delivered and what is within the communication, as well as an understanding of the source of the content. Once the implementation is completed the communication continues but becomes interconnected to training and mentoring the organization on the change.

It was the goal of the researcher not only to understand what communication tools were employed during successful PMO implementations, but also to understand what techniques were used for training and mentoring to institute the changes into the culture of the organization. When asked to describe methods that are employed to train and mentor and how they are instituted to integrate the changes into organizational culture, the emerging themes for this question were to work with leadership, define goals, design and employ an effective communication plan that includes communicating the goals, conduct training sessions, and partner coordinators with various groups to assist with changes.

Concei and Altman (2011) conducted a study on change management and training and discovered that planned change should be accompanied by effective training. The article also stated that the training could create a connection to the change taking place within the organization to help employees make a connection to the change and lessen the chance of rejection of the change. It was found that training and mentoring must also be connected to organizational goals, and the culture of the organization must drive how the training and

mentoring is instituted and, most importantly, who is selected for each of the initiatives.

Participants noted that it was important to partner change coordinators with others during the mentoring phase to ensure that the mentoring was being led by change champions.

Communication was intertwined throughout the entire findings of the study, and the importance of it and all other ties with organizational culture were two very strong emerging themes. Participants were capable of providing feedback and supportive thoughts around emerging themes, supporting the concept that change management is important to the success of PMO implementations.

### **Implications of the Study**

PMOs are instituted in order to provide structure for on-going project management within an organization. The ability to institute a sustainable PMO could mean that it needs to both be successfully operational and successful in project execution. It was explained in Chapter 2 that based on the history of change management and its relationship with project management it was found to begin with the HR department because there was belief that there needed to be a connection of change to the goals of the organization. Mustafa (2012) believed that understanding the role of the PMO and the needs of the organization could lend to a successful PMO implementation. The results of this study's findings suggest three implications for practice related to change management processes and their role in successful PMO implementations.

The first finding is the importance of creating a vision for the change and ensuring that it is derived from the goals and the mission of the organization that owns the change. Hill (2004) discussed the importance of creating a plan for a PMO implementation. The article also discussed how processes are necessary for successful implementations. Feldman (2012) stated that PMO implementations need processes to ensure the PMO is properly being created.

The second implication is that communication is an integral component of change management and should be managed from start to finish during not only the change management, but also the implementation. Kemp and Low (2008) pointed out that change management was a critical variable when concluding success after an implementation was completed. Communication, education and training were listed by Morris (2012) as key attributes when applying change management.

The third finding is that all decisions made with regards to the implementation, including processes selected for use during the implementation should accurately tie to the culture of the organization. Cristofalo (2012) noted that implementation planning should focus on including organizational culture to improve chances of success. The success of a PMO implementation could be improved if change management processes were involved and included,. Also important are communication, creating a vision and ensuring that vision is strategically connected to not only the goals of the organization, but also its culture.

### **Limitations of the Study**

The first limitation is the researchers' experience using the Delphi method as a research process. As noted early in the study, Gambatese (2010) observed the constant deviation from the traditional use of the Delphi method by Linstone and Turoff. While the researcher tried to stay in line with traditional methods used, the changes to the method by other researchers pose a question as to what is the right way to conduct the study.

The second limitation is this study focused on change management areas that were promoted through the use of Kotter's (2005) change management model, limiting the discussion on change management processes. In this study participants were allowed only to elect the processes provided and were not given the option to add processes not listed, thus limiting them

to those chosen based on Kotter's (2005) change model. The focus on the change management processes selected for this study created a boundary for participants, not to mention other change management processes that may have been included during the successful PMO implementations.

The third limitation of the study was presented when participants were asked to express the impact of change theory on change management processes. Even after modifications were made to the question following the field test, four of the fifteen respondents indicated that the question was unclear or that they were unfamiliar with change theory.

Finally, this study defined its own expert panel in order to conduct a study in which the sample population may not have completely represented all of those involved in successful PMO implementations. Also, the study began with 15 qualified participants and by the final round the number had decreased to nine participants, which impacted the level of information that was analyzed on emerging themes.

### **Recommendation for Future Research**

The change management processes explored during this Delphi study were identified as used within the execution of successful PMO implementation. While this study did not uncover the different variables used when change management processes need to be selected, it did reveal that change management processes play a role in the success of PMO implementations. Change management is present in successful PMO implementations but there needs to be further study on the specifics of how processes are selected and what value they have.

Based on the change management processes presented, the panelists identified two that were used during successful implementations, including constructing a vision for the change and communicating the change through the organization. The use of effective communication in

change management is not a simplistic endeavor and as noted earlier in the study there are different strategies that can be used to communicate the change.

The participants also came to consensus on the traits that come together to form a qualified change agent. There were areas where consensus was not met when reviewing particular processes used during successful implementations. When understanding change agents, it may be necessary to get more information regarding whether or not an agent is necessary or if one person involved in the change can take on the responsibilities of a change agent.

When considering how change management theory impacts those processes selected, it was discovered that theories can be used as a basis for understanding change management but do not need to be used specifically for process selection. This study recommends when selecting change management processes to focus on the needs of the organization as opposed to specific theories, while also considering whether it is beneficial to create change management processes that may not exist in order to get the best results.

Communication post implementation involves incorporating training and mentoring. The process of communication was consistently shown as beneficial when tied to organizational culture. Thus, it appears that it may be necessary to conduct further research to determine the best approach of communication efforts that are executed prior to the implementation and after the implementation is final.

Each area that was reviewed in this study with regard to change management processes revealed that connection to organizational culture and understanding underlying variables were imperative to success. This study recommends further research regarding specific processes, outside of theory, that would best lead to a successful PMO implementation. There should also

be a simultaneous discovery of underlying variables that need to be considered in order to properly determine which processes would work best based on the type of implementation selected.

## **Conclusion**

The results from this study show that change management plays a positive role in the success of PMO implementation. It was necessary to view the implementation of the PMO as a change itself in order to understand how these processes would work to benefit the effort. It was found that it is necessary to elect to use particular change management processes within the implementation in order to secure the success of the change. Experts who represented a population of professionals in the project management industry who have successfully implemented PMOs agreed that properly selected change management processes were value added.

Organizations will be able to use this information to better prepare for implementation when a decision is made to incept a PMO into the company. It must be understood that it is not as simple as developing new processes and distributing information once the implementation is complete. The successful implementation of a PMO is a strategic encounter that begins and ends with communication and adequate ties to organizational culture. There is a benefit in the studies available that cover the different variables that are attached to each of the processes presented in this study. However, there is limited information on change management as it relates directly to project management or PMOs specifically.

The findings within this study will be made stronger through the support of additional research and through efforts that help draw a connection between the PMO as a project and

change in itself and the connection between the PMO and the need for change management processes prior to, during, and after an implementation.

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## **APPENDIX A: ROUND ONE SURVEY INSTRUMENT**

Welcome to Round One of the study!

This study aims to answer the question of what role change management processes play in successful PMO implementations. Instructions: Please answer all questions truthfully and to the best of your knowledge. Once you have completed the questionnaire please submit your responses and await further instructions for ROUND 2. Thank you very much for your time and participation.

### **Survey Instrument**

1. Please Select a four digit code identifier that will be used to maintain anonymity throughout the study.
2. Please provide basic personal and professional information regarding your background:
  - a. Full Name
  - b. Email Address
  - c. Highest Earned Degree
  - d. Professional Discipline
  - e. Project Management Licensing/Certification and/or Additional Credentials
  - f. Years in the Project Management Field
  - g. Have you successfully designed or implemented a PMO using change management
4. When successfully implementing a PMO using change management, which of the following processes were used. (Please select all that apply.)
  - a. Displayed or created a sense of urgency in the organization
  - b. Formed a guiding coalition or a change management team
  - c. Used a Change agent to lead the effort
  - d. Constructed a vision or a plan for the change
  - e. Communicated the vision for change
  - f. Empowered the change
  - g. Created short term goals that support making the change permanent
  - h. Persistent in producing change
  - i. Integrated changes into the company culture
5. How do change management processes lend specific influences to the successful implementation of a PMO?
6. Express the impact of change theory on change management processes selected for use during a successful PMO implementation.
7. Describe an effective change agent in using change management processes for implementing a PMO and how can a change agent, as you have described, be prepared to lead a PMO implementation?
8. Explain the methods that are employed to communicate changes, as a result of the implementation, and how training and mentoring are instituted to integrate the changes into organizational culture.

## **APPENDIX B: ROUND ONE RESULTS EMAILED TO SURVEY PARTICIPANTS**

### **EFFECTIVE CHANGE MANAGEMENT PROCESSES FOR SUCCESSFUL PMO IMPLEMENTATION: A DELPHI STUDY**

#### **RESPONSES FROM ROUND ONE**

##### **Use this data to answer Question #2**

Response to Round One Question that asks what change management processes were used when successfully implementing a PMO.

- a. Communicated the vision for change
- b. Constructed a vision or a plan for the change
- c. Created short term goals that support making the change permanent
- d. Integrated changes into the company culture
- e. Empowered the change

##### **Use this data to answer Question #3**

Response to Round One Question pertaining to the explanation of how change management processes lend specific influences to the successful implementation of a PMO.

Please select the 5 that most accurately reflect your viewpoint.

- a. It facilitates the adoption as well as PMO roadmap.
- b. PMOs are frequently seen as overhead and wasteful. I took a change approach and addressed the psychology before looking at the practical elements. I started by understanding what was causing projects grief and addressed that first.
- c. Change management helps to overcome resistance to change. Fear of the unknown is the greatest obstacle and effective change management assures personnel of their own role in the new reality.
- d. Change management (IMHO) is about helping guide people through change. Without guiding them through the change, they would not necessarily understand the benefits of implementing a PMO.
- e. By quantifying the benefits to be gained, petty concerns were sidelined.
- f. Change management processes and goals that are based on the mission/vision and goals of the PMO are much more successful. The executive leadership of the organization in which the PMO exists must develop these and evangelize them throughout the organization. This must be a consistent, on-going activity. Creating a sense of urgency provides motivation throughout the organization. A change management should have the active involvement of the executive leadership team, at a minimum, the very obvious backing of executive leadership. A vision and plan for change management based on the mission/vision and goals of the PMO provides a road map for change. Short term goals and phased implementation prevent the organization from being overwhelmed by too much change in too short a period.

- g. We needed to map the changes from current processes (where they existed) and new processes for communication to the organization along with explanations of why the changes were being made and the advantages to be gained. We used communication of the changes in advance and provided job aids and documentation in addition to hands-on training. We also employed existing tools for minimal impact to desktops and integration with existing infrastructure. This facilitated acceptance and usage.
- h. People do not like change especially if it affects their day to day work. You have to show the benefits of the change before you can ask people to change.
- i. Most PMOS are highly political and many people will feel that you are getting into their territory, by using a strategic change approach it is easier to help get MOST parties on board
- j. Like any major alteration to a companies habits and norms, it takes an organized, coherent and consistent plan to implement and integrate a new methodology or way of doing business into an established business
- k. Change Management provides guidelines and helps in successfully implementing change. Identifying the right stakeholder was key process.
- l. Developing a roadmap to implement the PMO including vision, creating a proper process of communication and setting goals for the short, medium and long term, development of training program. All of these elements really helped in PMO implementation.
- m. A pragmatic approach, communication with all stakeholders, show benefits.
- n. The way the questions are posed is difficult to answer. I would have rephrased them to be more to the point. This is too theoretical and don't understand what you're looking for?

#### **Use this data to answer Question #4**

Response to Round One Question pertaining to the impact of change theory on change management processes selected for use during a successful PMO implementation.

Please select the 5 that most accurately reflect your viewpoint.

- a. Change management needs to be tied to organizational culture.
- b. Our PMO is now well established and embraced. Running well after 5 1/2 years.
- c. When personnel understand that they have a role in both making change happen and in the new processes that are being created, they become more comfortable with what is happening.
- d. I have only ever used Kotter's theory and of course, common sense ;-). I think every situation is unique... for example my implementation of a PMO at my current company is completely different from how I would have approached it at my last company... I really use Kotter's model because I am familiar with it and I have seen it work for me, but I don't implement his model 'to the letter of the law' ;-) I generally use common sense, my knowledge of the organization and the company/organization culture to determine how to approach change and what processes to follow and what to discard."
- e. I think it is better to have a community of initiatives to build commitment.
- f. The selections I made were based on my prior experiences, practical knowledge, gained through multiple PMO implementations.

- g. I'm not knowledgeable in change theory and cannot really address this question.
- h. I subscribe to the theory that people and organizations only change when their fear of the future exceeds the pains of the present. I paint a vivid picture of what life will be like if the changes in how projects are conducted is not implemented
- i. It helped a lot in implementation of PMO as change was communicated at higher level and then downwards. So top to bottom approach was used.
- j. I believe that the main purpose of using a process of change management is to engage people through involvement, joint construction and proper communication.
- k. Change is a project with assigned team. Responsibilities and authorities. Top Management involvement is a key success factor
- l. I think it is important to have a good theory on change management. The difficulty however, is how to implement it in an organization. Each organization is different, has a different culture, different people, etc. I think you should use a pragmatic approach and be flexible. However, the end result should be clear from the beginning, and modifications should be limited in number.

### **Use this data to answer Question #5**

Response to Round One Question pertaining to the description of an effective change agent and said change agent, as described, can prepare to lead a PMO implementation.

Please select the 5 that most accurately reflect your viewpoint.

- a. OPM3 + OCAI (Organizational Culture Assessment Instrument)
- b. Having an executive and CEO taking ownership and leadership was a great assistance in demonstrating the PMO was of value to the organisation. Being "validated" opened doors and brought more people on board.
- c. Active listening is the key characteristic of an effective change agent. Unless and until the inputs of team personnel are incorporated in the change plan, resistance will outweigh team objectives. Leading, then, is expressing curiosity and appreciation for new information and direction.
- d. I have been the lead for implementing our PMO and have acted as a change agent for guiding the organization through the change needed. Preparation for leading change (from my perspective at least) was/is all about understanding the strategic direction of the company and ensuring that the implementation of a PMO supported that direction. From there it's (relatively!) easy to prepare arguments and counter-arguments for why we need to change and what the benefits are to the organization and (much more importantly) to the individual... What's In It For Me (WIIFM) was most of my preparation material! ;-)
- e. I think the change agent needs to understand the complete remit of a PMO. Without this knowledge, they are unable to champion the holistic PMO, rather than becoming an admin adjunct to produce financials and a summary pack which adds no value.
- f. An effective change agent must understand the project related issues and challenges the business is facing. This change agent must be knowledgeable about the problems and challenges of the business and why the PMO has come into existence. With a clear and consensual understanding of why the executive leadership has identified a

- need for a PMO and what problems the PMO exists to address, the change agent can more effectively lead change. An effective change agent needs to understand the current culture of the organization.
- g. We used a variety of mechanisms to communicate the changes in advance along with benefits to the organization and the individuals. We used organic tools for the implementation (Lotus Notes in one instance, Remedy in another) to make access easy and ubiquitous to the users. As a visible leader in the organizations I was able to use both referent power (as a known expert in project management) and direct power due to my role (Director) to drive change.
  - h. A change agents is required to be able to effectively explain the change, the benefits of teh change and the process to implement the change to all affected groups in the organization. The change agent will be required to identify required phases of the implementation and communicate these effectively to all groups.
  - i. Win over someone who has shown resistance to the PMO. Do this by including them in the planning and creation of new processes. Have them help to pilot the new processes and then have them be a spokesperson for those new processes.
  - j. The person doing the change must have a track record of success in managing projects and can point to a high degree of successful projects completed. If you don't have credibiltiy as an actual project manager in the area of technology, you can not be accepted or successful
  - k. Everything was linked to strategy and change was directly liked to it, As everyone realized the importance so was not much of resistance.
  - l. A sponsor for the PMO implemantation was a Strategy VP. He was always accompanied by me and was told about all the changes we were implementing with the PMO. His support was important to overcome barriers in the VP level and we have a chance to clearly present to the board the purpose of implementing the PMO.
  - m. Change agent in our approach is change project sponsor - representative of top management that is responsible for change success.
  - n. Communication, commitment, vision, ability to motivate, involvement are all critical when it comes to using an change agent.

#### **Use this data to answer Question #6**

Response to Round One Question pertaining to the description of methods that are employed to communicate changes, as a result of the implementation, and how training and mentoring are instituted to integrate the changes into organizational culture.

Please select the 5 that most accurately reflect your viewpoint.

- a. Quick sheets, project announcements, information radiators.
- b. Capability (training & mentoring) remain a core part of what our PMO does. We started with a few foundation courses, a 2 day course which is still extremely popular and then we introduced foral qualification courses - Certificate IV, Dimplom and Advanced Diploma. I also have run workshops for steering committees and sit on all steering committees for strategic projects to enable me to subtly model to novice committee members. I mentor less experienced project managers and meet regularly with all senior project members for more informal professional development.

- c. Communication must begin very early in the planning phase and should occur, to the extent possible, in team settings. This permits those affected to comprehend how the change plan is constructed and how it is to be implemented.
- d. I have used email, blogs, company meetings, organizational meetings, local meetings in different geographies and conference calls... all are necessary as people learn/find out about things using different media... With respect to training and mentoring, we created training packages and podcasts (30-45 mins and 5-7 mins respectively) to support the PMO implementation. Different training was needed for different levels in the organization... e.g. very high level for the VP's/Directors and more in-depth for People Manager's and Project Managers/Consultants
- e. To communicate changes, I suggest that a message from the Sponsor is used to establish the merit of the implementation and then there is a lot of one to one as the champions cascade a unified message.
- f. Work with the constituents of the PMO, the executive leadership team, to determine a unanimously agreed to business purpose, vision, and mission for the PMO, their PMO. And based upon this vision and mission, an actionable set of PMO goals will also be consensually agreed to. And, each goal will be further defined and agreed to in terms of measurable objectives that specify the how much and by when of that which is to be accomplished. The mission/vision, goals and objectives are communicated to the organization. This communication will demonstrate how the goals and objectives are tied the goals, objectives, and strategy of the organization. These communication efforts will employ the "WIIFM" principle (what's in it for me). Communication efforts will vary based on the culture of the organization, the capabilities of the organization, the size organization, the geography and other factors. Whenever possible face to face communication should be employed, meetings, presentations, video conferencing can be used. In large organizations, webinars, seminars, and classroom training can be effective methods of training. Mentoring can be effective in some organizations if the conditions and culture are right. However, effective mentoring is focused with specific objectives in mind.
- g. We used a wide variety of communication channels, including e-mail, printed collateral (brochures & posters), web page announcements, instructor led group training, and town hall forums. Using the core tools (Lotus Notes and Remedy) also facilitated the change by being core to daily work activities and processes consistent with the current culture and significant benefit to users by being able to directly request and monitor progress of projects.
- h. In person meetings are best, live WebEx or other virtual meetings are ok, email is not a good communication median. Regular progress reports and future implementaiton information is good to communicate to all groups. Involving a fiocus group representing the affected groups is also a good communication tactic as it creates mini-change agents in each group.
- i. A PMO should have a communication plan. Any new processes rolled out should have a communication plan. A basic approach would be to have previews or pre-announcements, followed by 'coming soon' announcements, followed by visiting individual groups or department meetings for review and discussion and questions. When it is time to roll out the new approach aside from conducting training sessions, you might

also partner coordinators with various groups so that each group has someone to help them and give them personalized changes.

- j. I first present to Senior Management and show them that their failures in the past are entirely their own doing and that they and they alone have been responsible for poor project performance. As a former Senior Executive in the Technology field, I can get away with this level of behavior. I extrapolate their current performance if not changed into future loss of new products resulting in loss of revenue and its impact on the organizations market value with the resulting loss of jobs.. I personally usually work with a Senior Internal person who has been selected for the Head of the PMO role and become their shadow coach and help guide them through the details of the change process. We usually start with one major group and demonstrate and advertise success stories.
- k. Described the benefit in change, Conducted a lot of training. Implemented Gradually.
- l. We use videos in coffee rooms TV using the corporate communications department, we done workshops for groups of stakeholders to communicate the implementation of PMO and what would be its mission, developed brochures explaining the processes and methods of operation, catalog services, etc.
- m. Project Management training for top management is starting activity. After the training goals are set, change management team is assigned, roadmap and implementation plan is developed and approved. Change management team got an authority to require support. Change is started from the implementation of PM system in pilot projects, or pilot department. The results are showed and discussed, and then implemented in other projects and departments. PMO governs this process with the help of PM consultants.
- n. Communication plan, clear vision, "what's-in-it-for-me", positive elements, risk management
- o. Methods all depend on the size of the organization. It's maturity in managing projects and their own hybrid PM processes - remember that no single organization truly adopts or implements a PMO just like that - methods may include; 1. Establishing a monthly PMO governance council supported by the org leadership team, 2. Updating existing training to include PMO processes just implemented 3. Holding Townhall

## **APPENDIX C: ROUND TWO SURVEY INSTRUMENT**

Welcome to Round Two of the study!

Instructions: Please use the previously sent email to answer all questions truthfully and to the best of your knowledge. Once you have completed the questionnaire please submit your responses and await further instructions for ROUND 3.

Thank you very much for your time and participation.

### **Survey Instrument**

- a. Please Select a four digit code identifier that will be used to maintain anonymity throughout the study.
- b. The Round One Survey results email that was previously sent, lists the top five change management processes selected by the panel. Please review these responses and select the three that most accurately reflected your experiences.
  - Communicated the vision for change
  - Constructed a vision or a plan for the change
  - Created short term goals that support making the change permanent
  - Integrated changes into the company culture
  - Empowered the change
- c. The Round One survey results e-mail that was previously sent lists 14 narrative responses depicting panelists' explanation of how change management processes lend specific influences to the successful implementation of a PMO. Please review these responses (on the email) and pick the five that most accurately reflect your viewpoint.
  - A
  - B
  - C
  - D
  - E
  - F
  - G
  - H
  - I
  - J
  - K
  - L
  - M
  - N
- d. The Round One survey results e-mail that was previously sent lists 12 narrative responses depicting panelists' explanation of the impact of change theory on change management processes selected for use during a successful PMO implementation. Please review these responses (on the email) and pick the five that most accurately reflect your viewpoint.
  - A

- B
  - C
  - D
  - E
  - F
  - G
  - H
  - I
  - J
  - K
  - L
- e. The Round One survey results e-mail that was previously sent lists 14 narrative responses depicting panelists' description of an effective change agent and said change agent, as described, can prepare to lead a PMO implementation. Please review these responses (on the email) and pick the five that most accurately reflect your viewpoint.
- A
  - B
  - C
  - D
  - E
  - F
  - G
  - H
  - I
  - J
  - K
  - L
  - N
- f. The Round One survey results e-mail that was previously sent lists 15 narrative responses depicting panelists' description of methods that are employed to communicate changes, as a result of the implementation, and how training and mentoring are instituted to integrate the changes into organizational culture. Please review these responses (on the email) and pick the five that most accurately reflect your viewpoint
- A
  - B
  - C
  - D
  - E
  - F
  - G
  - H
  - I
  - J
  - K

- L
- N
- O

## **APPENDIX D: ROUND THREE SURVEY INSTRUMENT**

Welcome to Round Three of the study!

Instructions: Please use the previously sent email to answer all questions truthfully and to the best of your knowledge. Once you have completed the questionnaire please submit your responses and await further instructions for the Round Four.

Thank you very much for your time and participation.

1. Please enter your previously selected 4 digit code.
2. The Round Two survey results e-mail that was previously sent lists 5 narrative responses depicting panelists' explanation of how change management processes lend specific influences to the successful implementation of a PMO. Please review these responses (on the email) and pick the two that most accurately reflect your viewpoint.
  - A
  - B
  - C
  - D
  - E
3. The Round Two survey results e-mail that was previously sent lists 3 narrative responses depicting panelists' explanation of the impact of change theory on change management processes selected for use during a successful PMO implementation. Please review these responses (on the email) and pick the one that most accurately reflects your viewpoint.
  - A
  - B
  - C
4. The Round Two survey results e-mail that was previously sent lists 4 narrative responses depicting panelists' description of methods that are employed to communicate changes, as a result of the implementation, and how training and mentoring are instituted to integrate the changes into organizational culture. Please review these responses (on the email) and pick the two that most accurately reflect your viewpoint.
  - A
  - B
  - C
  - D

## **APPENDIX E: ROUND TWO RESULTS EMAILED TO SURVEY PARTICIPANTS**

### **EFFECTIVE CHANGE MANAGEMENT PROCESSES FOR SUCCESSFUL PMO IMPLEMENTATION: A DELPHI STUDY**

#### **RESPONSES FROM ROUND TWO**

##### **Use this data to answer Question #2**

Response to Round Two Question pertaining to the explanation of how change management processes lend specific influences to the successful implementation of a PMO.

Please select the 2 that most accurately reflect your viewpoint.

- a. Change management helps to overcome resistance to change. Fear of the unknown is the greatest obstacle and effective change management assures personnel of their own role in the new reality.
- b. Change management processes and goals that are based on the mission/vision and goals of the PMO are much more successful. The executive leadership of the organization in which the PMO exists must develop these and evangelize them throughout the organization. This must be a consistent, on-going activity. Creating a sense of urgency provides motivation throughout the organization. A change management should have the active involvement of the executive leadership team, at a minimum, the very obvious backing of executive leadership. A vision and plan for change management based on the mission/vision and goals of the PMO provides a road map for change. Short term goals and phased implementation prevent the organization from being overwhelmed by too much change in too short a period.
- c. We needed to map the changes from current processes (where they existed) and new processes for communication to the organization along with explanations of why the changes were being made and the advantages to be gained. We used communication of the changes in advance and provided job aids and documentation in addition to hands-on training. We also employed existing tools for minimal impact to desktops and integration with existing infrastructure. This facilitated acceptance and usage.
- d. Like any major alteration to a companies habits and norms, it takes an organized, coherent and consistent plan to implement and integrate a new methodology or way of doing business into an established business
- e. Developing a roadmap to implement the PMO including vision, creating a proper process of communication and setting goals for the short, medium and long term, development of training program. All of these elements really helped in PMO implementation.

##### **Use this data to answer Question #3**

Response to Round Two Question pertaining to the impact of change theory on change management processes selected for use during a successful PMO implementation.

Please select the 1 that most accurately reflects your viewpoint.

- a. When personnel understand that they have a role in both making change happen and in the new processes that are being created, they become more comfortable with what is happening.
- b. The selections I made were based on my prior experiences, practical knowledge, gained through multiple PMO implementations.
- c. I think it is important to have a good theory on change management. The difficulty however, is how to implement it in an organization. Each organization is different, has a different culture, different people, etc. I think you should use a pragmatic approach and be flexible. However, the end result should be clear from the beginning, and modifications should be limited in number.

#### **Use this data to answer Question #4**

Response to Round Two Question pertaining to the description of methods that are employed to communicate changes, as a result of the implementation, and how training and mentoring are instituted to integrate the changes into organizational culture.

Please select the 2 that most accurately reflect your viewpoint.

- a. Communication must begin very early in the planning phase and should occur, to the extent possible, in team settings. This permits those affected to comprehend how the change plan is constructed and how it is to be implemented.
- b. Work with the constituents of the PMO, the executive leadership team, to determine a unanimously agreed to business purpose, vision, and mission for the PMO, their PMO. And based upon this vision and mission, an actionable set of PMO goals will also be consensually agreed to. And, each goal will be further defined and agreed to in terms of measurable objectives that specify the how much and by when of that which is to be accomplished. The mission/vision, goals and objectives are communicated to the organization. This communication will demonstrate how the goals and objectives are tied to the goals, objectives, and strategy of the organization. These communication efforts will employ the "WIIFM" principle (what's in it for me). Communication efforts will vary based on the culture of the organization, the capabilities of the organization, the size of the organization, the geography and other factors. Whenever possible face to face communication should be employed, meetings, presentations, video conferencing can be used. In large organizations, webinars, seminars, and classroom training can be effective methods of training. Mentoring can be effective in some organizations if the conditions and culture are right. However, effective mentoring is focused with specific objectives in mind.
- c. A PMO should have a communication plan. Any new processes rolled out should have a communication plan. A basic approach would be to have previews or pre-announcements, followed by 'coming soon' announcements, followed by visiting individual groups or department meetings for review and discussion and questions. When it is time to roll out the new approach aside from conducting training sessions, you might also partner coordinators with various groups so that each group has someone to help them and give them personalized changes.
- d. Communication plan, clear vision, "what's-in-it-for-me", positive elements, risk management

**APPENDIX F: ROUND THREE FREQUENCY FOR EXPLANATIONS OF HOW  
CHANGE MANAGEMENT LENDS SPECIFIC INFLUENCES TO SUCCESSFUL PMO  
IMPLEMENTATION**

Response	Frequency
Change management helps to overcome resistance to change. Fear of the unknown is the greatest obstacle and effective change management assures personnel of their own role in the new reality.	<b>25%</b>
Change management processes and goals that are based on the mission/vision and goals of the PMO are much more successful. The executive leadership of the organization in which the PMO exists must develop these and evangelize them throughout the organization. This must be a consistent, on-going activity. Creating a sense of urgency provides motivation throughout the organization. A change management should have the active involvement of the executive leadership team, at a minimum, the very obvious backing of executive leadership. A vision and plan for change management based on the mission/vision and goals of the PMO provides a road map for change. Short term goals and phased implementation prevent the organization from being overwhelmed by too much change in too short a period.	<b>75%</b>
We needed to map the changes from current processes (where they existed) and new processes for communication to the organization along with explanations of why the changes were being made and the advantages to be gained. We used communication of the changes in advance and provided job aids and documentation in addition to hands-on training. We also employed existing tools for minimal impact to desktops and integration with existing infrastructure. This facilitated acceptance and usage.	<b>50%</b>
Like any major alteration to a companies habits and norms, it takes an organized, coherent and consistent plan to implement and integrate a new methodology or way of doing business into an established business	<b>16.7%</b>
Developing a roadmap to implement the PMO including vision, creating a proper process of communication and setting goals for the short, medium and long term, development of training program. All of these elements really helped in PMO implementation.	<b>33.3%</b>

## **APPENDIX G: ROUND THREE FREQUENCY FOR THE EXPLANATIONS OF HOW CHANGE THEORY IMPACTS CHANGE MANAGEMENT PROCESSES SELECTED**

<b>Response</b>	<b>Frequency</b>
When personnel understand that they have a role in both making change happen and in the new processes that are being created, they become more comfortable with what is happening.	<b>50%</b>
The selections I made were based on my prior experiences, practical knowledge, gained through multiple PMO implementations.	<b>25%</b>
I think it is important to have a good theory on change management. The difficulty however, is how to implement it in an organization. Each organization is different, has a different culture, different people, etc. I think you should use a pragmatic approach and be flexible. However, the end result should be clear from the beginning, and modifications should be limited in number.	<b>25%</b>

**APPENDIX H: ROUND THREE FREQUENCY FOR DESCRIPTION OF METHODS  
USE TO COMMUNICATE CHANGE AND TRAIN AND MENTOR**

<b>Response</b>	<b>Frequency</b>
Communication must begin very early in the planning phase and should occur, to the extent possible, in team settings. This permits those affected to comprehend how the change plan is constructed and how it is to be implemented.	<b>25%</b>
Work with the constituents of the PMO, the executive leadership team, to determine a unanimously agreed to business purpose, vision, and mission for the PMO, their PMO. And based upon this vision and mission, an actionable set of PMO goals will also be consensually agreed to. And, each goal will be further defined and agreed to in terms of measurable objectives that specify the how much and by when of that which is to be accomplished. The mission/vision, goals and objectives are communicated to the organization. This communication will demonstrate how the goals and objectives are tied the goals, objectives, and strategy of the organization. These communication efforts will employ the "WIIFM" principle (what's in it for me). Communication efforts will vary based on the culture of the organization, the capabilities of the organization, the size organization, the geography and other factors. Whenever possible face to face communication should be employed, meetings, presentations, video conferencing can be used. In large organizations, webinars, seminars, and classroom training can be effective methods of training. Mentoring can be effective in some organizations if the conditions and culture are right. However, effective mentoring is focused with specific objectives in mind.	<b>75%</b>
A PMO should have a communication plan. Any new processes rolled out should have a communication plan. A basic approach would be to have previews or pre-announcements, followed by 'coming soon' announcements, followed by visiting individual groups or department meetings for review and discussion and questions. When it is time to roll out the new approach aside from conducting training sessions, you might also partner coordinators with various groups so that each group has someone to help them and give them personalized changes.	<b>66.7%</b>
Communication plan, clear vision, "what's-in-it-for-me", positive elements, risk management	<b>33.3%</b>

## **APPENDIX I: ROUND FOUR SURVEY INSTRUMENT**

Welcome to Round Four of the study!

Instructions: Please use the information provided prior to each question to answer each question truthfully and to the best of your knowledge. Once you have completed the questionnaire please submit your responses. This is our fourth and final Round.

Thank you very much for your time and participation.

1. Please enter your previously selected 4 digit code.
2. When asked what change management processes were used when successfully implementing a PMO the emerging themes in the responses for this question involved communication of the vision and constructing a vision or plan for the change.

What are your responses to these themes? What do these themes tell you when trying to understand the role change management processes play in successful PMO implementation?

3. When asked to explain how change management processes lend specific influences to the successful implementation of a PMO the emerging themes in the responses were that change management processes and goals that are based on the mission/vision and goals of the PMO are much more successful. The executive leadership of the organization in which the PMO exists must develop these and evangelize them throughout the organization. This must be a consistent, on-going activity. Creating a sense of urgency provides motivation throughout the organization. A change management should have the active involvement of the executive leadership team, at a minimum, the very obvious backing of executive leadership. A vision and plan for change management based on the mission/vision and goals of the PMO provides a road map for change. Short term goals and phased implementation prevent the organization from being overwhelmed by too much change in too short a period.

What are your responses to these themes? What do these themes tell you when trying to understand explain how change management processes lend specific influences to the successful implementation of a PMO?

4. When asked to explain the impact of change theory on change management processes selected for use during a successful PMO implementation the emerging theme for responses to this question was that change management needs to be tied to organizational culture.

What are your responses to this theme? What does this theme tell you when trying to understand the impact of change theory on change management processes selected for use during a successful PMO implementation.

5. When asked to describe an effective change agent and how a change agent can be prepared to lead a PMO implementation the emerging theme for this question was that effective change agents are active listeners, curious and appreciative of the new direction. They incorporate the inputs of the team personnel into the change plan. They also understand issues and challenges related to the project, the company's culture and the identified need for the PMO.

What are your responses to these themes? What do these themes tell you when trying to describe an effective change agent and how a change agent can be prepared to lead a PMO implementation?

6. When asked to describe methods that are employed to communicate changes, as a result of the implementation, and how training and mentoring are instituted to integrate the changes into organizational culture the emerging themes for this question were to work with leadership, define goals, design and employ an effective communication plan that includes communicating the goals, conducting training sessions, and partnering coordinators with various groups to assist with changes.

What are your responses to these themes? What do these themes tell you when trying to describe methods that are employed to communicate changes, as a result of the implementation, and how training and mentoring are instituted to integrate the changes into organizational culture?

## APPENDIX J: ROUND FOUR RESULTS

1. When asked what change management processes were used when successfully implementing a PMO the emerging themes in the responses for this question involved communication of the vision and constructing a vision or plan for the change.

What are your responses to these themes? What do these themes tell you when trying to understand the role change management processes play in successful PMO implementation?

- A. What are management intentions and how serious are they about this pmo effort.
  - B. I think these themes are critical in designing, implementing and evaluating a PMO that will be adopted across an organisation. I have found more support when the initial message and engagement are targeted at overcoming barriers instead of introducing what is perceived to be bureaucratic overhead.
  - C. A vision is useless unless it is shared by those who must implement it. So, the vision must be developed collaboratively and the collaboration must be iterative.
  - D. It is important to make the theme for the change, compelling, immediate and with dire consequences if the changes fo not occur
  - E. It's important for the head leading the PMO implementation to have a clear vision of what it will be in the future. The vision and the plan for the change must be created and, no less important communicate in correct way for different publics to achieve the commitment to execute the plan.
  - F. I agree with this themes. I believe that the communication of the vision and plan is crucial to acceptance within the organization.
  - G. It's really common sense (which applies a lot when you are dealing with human beings!); at the end of the day if you don't have a vision that people can buy into and you don't communicate that vision effectively, any change or transition is doomed to failure, whether it is a PMO implementation or something else...
  - H. I think these themes are spot on and critical to the success of a new PMO. (Or to an existing and growing PMO too for that matter.) The vision and the communication and gathering of commitment toward that vision is so important. Also - if you are creating a PMO and you do not have a plan, why would your organization trust you to complete your mission?
  - I. Creating and communicating a vision that resonates with the organization is the first step in effective change management. Change management is critical to the success of any implementation, and particularly for a PMO implementation. The vision must be clear, inspirational, and considered attainable.
2. When asked to explain how change management processes lend specific influences to the successful implementation of a PMO the emerging themes in the responses were that change management processes and goals that are based on the mission/vision and goals of the PMO are much more successful. The executive leadership of the organization in which the PMO exists must develop these and evangelize them throughout the organization. This must be a consistent, on-going activity. Creating a sense of urgency provides motivation throughout the organization. A change management should have the active involvement of the executive

leadership team, at a minimum, the very obvious backing of executive leadership. A vision and plan for change management based on the mission/vision and goals of the PMO provides a road map for change. Short term goals and phased implementation prevent the organization from being overwhelmed by too much change in too short a period.

What are your responses to these themes? What do these themes tell you when trying to understand explain how change management processes lend specific influences to the successful implementation of a PMO?

- A. These two allows CM to be conducted within better "control" and less surprises,
- B. I would agree with the themes but terms like "evangelise" may be a bit cultural. Certainly in Australia that term would not be well perceived due to the strong religious overtones and inference of superiority, neither of which sit well in this culture.
- C. Executive support is more important than executive leadership. Individual contributors must be allowed, encouraged, to take leadership of aspects of the implementation.
- D. The Vision and Need for the change must be communicated with a continuing sense of urgency and importance. Individuals who are resisting need to be isolated and if necessary removed from the process.
- E. I believe that a process of implementation of a successful PMO goes through this study and planning of change plan. By building this plan, the head must take into account all the events that occur in the organization, not only on the topic PMO. Because if the organization is promoting other significant changes at the same time, as systems or processes, operational load too high or even cultural changes in general is likely that stakeholders will feel pressured and the result can not be good. Therefore it is important that the head takes into account the whole environment when planning organizational change plan to deploy the PMO in order to be more successful.
- F. I agree completely. People are much more apt to accept and embrace change when there is a compelling vision, mission and set of goals that are developed with the greater good of the organization at their heart.
- G. I don't believe a successful PMO implementation can be treated any different to any other change or transition that you want to stick and be successful. All of these themes confirm the need for human beings to be engaged and informed and for associates/employees to see and believe that their management/executive leadership are also bought into the change/transition... I do believe a lot of this is psychology related... no human wants to be part of, or seen to be part of something unsuccessful, so they are looking for the what's in it for me (WIIFM)
- H. I think it is a reminder that change - be it for a PMO or other venture - needs to be managed strategically.
- I. The common theme here is continual communication and support from both the executive and executing levels. Overt support from leadership must be direct and cannot be delegated and effective. The executing team must also continually communicate and execute both the implementation plan and the change management plan.

3. When asked to explain the impact of change theory on change management processes selected for use during a successful PMO implementation the emerging theme for responses to this question was that change management needs to be tied to organizational culture.

What are your responses to this theme? What does this theme tell you when trying to understand the impact of change theory on change management processes selected for use during a successful PMO implementation.

- A. Organizational culture is medullar in any PMO implementation and CM needs to be aligned to it in order to become efficient.
- B. Critical. Not getting this right will set you up for failure.
- C. A PMO implementation is a cultural change so the existing culture must be the starting line. The objective is to supplement the existing culture with new value while preserving the existing value to the extent possible.
- D. Implementation of an effective PMO often requires a major change to the organizational culture. Trying to do everything possible within the established culture will inhibit the successful implementation. The culture must be driven to change based on what will now be effective.
- E. As the own PMO should be built based on the culture of the organization and its stakeholders and their expectations, the change plan should also take these factors into account to be successful. The very establishment of the PMO is already a big change then it would be more productive not to include more news at this time. Keep communication within the normal range, does not establish more changes in peripheral processes beyond the proper implementation of the PMO.
- F. I agree. Know your audience.
- G. I totally agree with this theme... organization culture understanding is absolutely paramount... if an organization is not ready for a change/transition, or they are ready, but only for part of it, you MUST be mindful of that and feature that in your plans. Many of the failed changes/transitions that I have seen in the past were because the change/transition agents did not do their homework and didn't understand the organization readiness for the change... much of this is driven by culture... as an example, my current change/transition project is a multi-year effort... the company would have preferred it to be a 1 year effort ... it would have failed had we tried to complete it in 1 year because the culture of the organization is such that people need more time to absorb and buy into the change ....
- H. Absolutely - I have seen groups within an organization completely derail what would have been a positive change for that organization - simply because they were not approached correctly, the change was not managed correctly, the change was not communicate correctly and at this specific organization people really did have the power to derail initiatives.
- I. Change is a core theme, but is never simple or easy from an organizational perspective. Culture develops over time and must be re-directed or changed over time as well.

4. When asked to describe an effective change agent and how a change agent can be prepared to lead a PMO implementation the emerging theme for this question was that effective change agents are active listeners, curious and appreciative of the new direction. They incorporate the inputs of the team personnel into the change plan. They also understand issues and challenges related to the project, the company's culture and the identified need for the PMO.

What are your responses to these themes? What do these themes tell you when trying to describe an effective change agent and how a change agent can be prepared to lead a PMO implementation?

- A. Opening to new venues and opportunities.
  - B. The only thing I would add is that they need to be respected by their peers – to be perceived as credible.
  - C. An effective change agent must be patient, humble, and very sensitive to the ideas and emotions of others. The incorporation of inputs must be a team consensus exercise and not the prerogative of the change agent.
  - D. The change agent must drive the implementation and therefore will step on toes and sometimes alienate various stakeholders. It requires courage, perserverance and an intolerance for BS from the organization.
  - E. I believe that the characteristics mentioned are part of a change agent but I believe that the main factor that makes an effective change agent is to believe in what he is deploying. It is necessary that that person has knowledge about PMO also has speech and aligned with the sponsor. Alignment is the key factor, therefore the preparation of this agent undergoes a lot of talk and clarity of what you want to do in the implementation of the PMO and the benefits with this.
  - F. I agree. Communication is key and all of these activities depend on frequent, appropriate communication. These are also key leadership traits and strong leadership is key to change.
  - G. Agree totally. You must listen and adapt based on what you hear. As an example, my current change/transition project was going well, but when I spoke directly to people I could sense pushback... only after gaining confidence that I would listen and adapt was I able to understand the concerns.... adapting the project based on the concerns has given me people's confidence that the project is in their best interests...
  - H. Yes - there needs to be a champion or champions from the major areas impacted and these people need to be well respected within the organization. In turn you need to ensure that you do not damage their credibility with your implementation.
  - I. These themes speak to the need for a collaborative change agent approach that includes adaptive leadership as a mechanism for driving change
5. When asked to describe methods that are employed to communicate changes, as a result of the implementation, and how training and mentoring are instituted to integrate the changes into organizational culture the emerging themes for this question were to work with

leadership, define goals, design and employ an effective communication plan that includes communicating the goals, conducting training sessions, and partnering coordinators with various groups to assist with changes.

What are your responses to these themes? What do these themes tell you when trying to describe methods that are employed to communicate changes, as a result of the implementation, and how training and mentoring are instituted to integrate the changes into organizational culture?

- A. These communication and knowledge transfer tools has to be tied to OC in order to be effective.
- B. I have no specific thoughts to add here. I just concur.
- C. If the development of the vision and the implementation plan are the result of adequate collaboration, communication and training will be automatic. Coordinators will be eager to see their work product become effective in the organization.
- D. My approach has always been to implement the new approaches and coach team members in their use. Give everyone a fair chance to get on board, but explain that there is a time limit after which the Boat leaves and some people will be left on shore.
- E. Begins with clear identification of stakeholders, define their roles and responsibilities, understand their commitment to the implementation of the PMO. The training involves sharing information and bringing these stakeholders together to build the PMO and the change plan. After going live is important to periodically monitor and support these stakeholders to maintain its position and support the longevity of the PMO in the organization with formal sessions of mentoring and training, if needed.
- F. I agree. Change only occurs through people. People only change when they understand the need for change, the goals are clearly understood and the expectations are communicated.
- G. This has been my approach on my current change/transition project.  
Leadership tells you what the company needs... defining the goals helps you understand what the organization/division needs... having leadership help you with communicating those goals sets the tone for the change (why, what)... and if you don't mentor/train/help people through those changes you cannot expect those changes to come easily, which includes them being pulled into the mainstream organizational culture... More importantly than these themes, is to come back and review the goals, review the status, review the communication plan, review the training and review where we are against plan to ensure you are not "flogging a dead horse"! If the change/transition project is not going well, you need to ascertain why and then adapt to meet the organization culture in a timely manner. Failure to adapt in a timely manner will put your change/transition effort at further risk (standards of deviation will increase as time goes on, hence the need for timely action).
- H. I do not have anything new to add here.

- I. These themes address the depth and breadth of communication types and vehicles necessary to integrate changes into organizational culture. We must start with goals, communicate on a personal level (mentoring) and follow-up with individual and group behavioral adjustment (training).