

# PROTECTING THE SCOPE VIA CHANGE MANAGEMENT

*A case study for the CAPM® Certification Course*



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## Introduction

The BWP Consulting Company evaluates businesses and helps them streamline their operations so that they can reduce their overall cost and increase customer satisfaction. The company's process improvement division consists of project managers who are assigned to projects requested by customers. Based on the project submission form and the contract agreement, data can be retrieved to create the project charter and define the statement of work.

Due to the nature of the business, change requests are imminent and must be managed closely to ensure nothing is lost in the process and that the customer is satisfied at project conclusion. Some change requests are minor and have minimal impact on the defined timeline, but others are significant and require an extensive schedule adjustment that could impact the customer's business in a negative way.

The service provider has a formal change management process in place, but the process is not always followed. While it does insist that changes are reviewed and tested, it does not happen consistently and personal biases get in the way at times. Some staff feel that it is okay to allow some changes to happen if they are beneficial and satisfy customers, regardless of whether they support the scope of the project. Finalizing the scope of work is very critical for any project, and issues around scoping have often resulted in unsatisfied customers and rework.

## Challenges

The consulting company is receiving a high volume of complaints from its customers related to the project manager's lack of skill in managing, approving, and implementing change per their specifications. Customers claim that either the changes they did not approve are being implemented or the changes they did approve are not being executed or have an inordinate impact on project schedule or cost. They are also frustrated that they do not receive prior notice if the execution of a change will cause a change in cost or delay in the final date.

Customers are also concerned with changes that cause more issues than necessary. They have hired the company to help them solve problems and not cause more problems. Changes that are apparent in the beginning of the project or that occur due to a problem caused by the consulting company take too much time to be reviewed and assessed. The customers want the team to work proactively and resolve these changes with little to no impact to them as the customer.

## **Solution**

The Project Management Body of Knowledge prescribes best practices on managing change requests and resolving the issues experienced by managing change. Managing Change requires a structured and consistent format for identifying, assessing, and evaluating changes and determining the impact caused by requests.

The recommended approach evaluates changes in the following manner:

- A formally written change request is submitted by stakeholder
- Change request is captured in change log
- Project Manager or Change Request Review Board reviews change request
- Triple constraints are used to focus the review process. Does it support the scope? How does it impact the budget and schedule? Are there any risks, potential quality issues, and shift in resources?
- A decision is made to approve or deny the request
- Denied requests are documented on the change log
- Approved requests are assigned to a person responsible for executing the change and captured on the change log
- The responsible party carries out the duties of the change request while maintaining quality standards and the integrity of the project

- The executed tasks of the change request are checked for correctness to ensure quality is intact
- If no quality issues are present, the request can be closed
- If there are quality issues, they need to be corrected, re-evaluated, and confirmed acceptance prior to closing out
- Document and formally close out fully executed change requests that meet customer requirements.

A predefined and agreed upon process for change management ensures that transparency and visibility are maximized for the client, project team, and subcontractors. Through this step-by-step approach for managing change requests, the consulting company will be able to use the right information and make the best decision for their customer, which is focused on customer needs and not on internal factors or matters of convenience.

This standardized, repeatable process will ensure that the project manager, change advisory board, and change implementer all work together to make changes in a way that reduces the likelihood of changes causing issues downstream to the customer. It will also allow customers to be more engaged throughout the process so that they understand how change requests are evaluated and made and how they impact the overall deliverable and deadline.

## **Approach**

To effectively implement the change request process, a facilitator must be appointed to drive the process. It can be the project manager with an evaluation team or someone working with the project manager.

Along with having a facilitator to manage the process, everyone involved in the execution of the project should be trained on the process to ensure they are properly educated and in compliance with the requirements. The focus must be on the customer and supporting the defined scope of the project. This should drive all decisions and any discrepancies that may occur. The consulting

company's ability to run an effective change request program will determine the level of customer satisfaction attained.

Once the change management process is properly established, it is important to develop a culture of following defined processes that focus on customer satisfaction. This means that each team member believes and commits to the value of having a change request process and ensures that no changes are implemented without following the change process.

Finally, key metrics must be established, measured, and managed to determine whether the change process is effectively working.

## **Final Outcome**

With a change request process in place, the consulting company will be able to make all the changes it needs per its defined process and g achieve customer satisfaction. Instead of

changes resulting in customer complaints, the change request process will manage change requests, resulting in executing only customer-focused changes. It will also enable the service provider to communicate more effectively with its customers about changes, allowing them to understand when changes will occur and what the potential impact will be on their business.

## **Critical Success Factor**

An effective change request process is focused on delivering changes that support only the customer and the scope of the project and not promoting the personal interest of project managers and team members. This is how a company can effectively manage a project and mitigate the risk of making changes that drive customer complaints and dissatisfaction. Unauthorized changes will no longer occur, and complaints, disruptions, defects, and rework will reduce.

## Lessons Learned

While many change requests are expected when managing projects that result in change, there must be a process in place to ensure that the focus is on maintaining customer satisfaction. This can be achieved through an efficient and effective change request process, along with verification and oversight. Everyone will be educated and trained on the change request process to ensure expectations are clear.