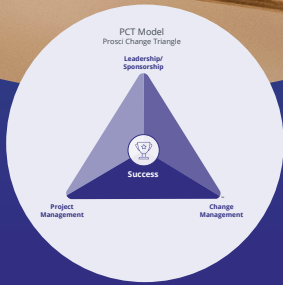
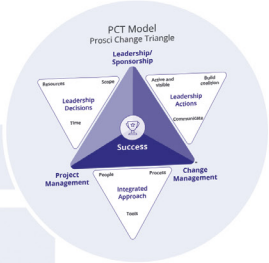


Applying the PCT Model

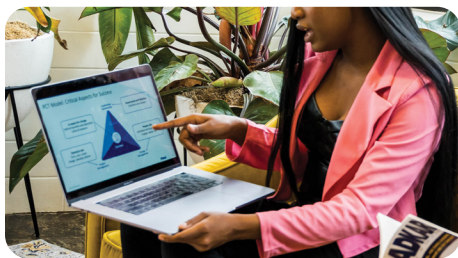


- 01 Positions a project for success
- 02 Improves project health
- 03 Is a leading indicator for the achievement of organizational outcomes



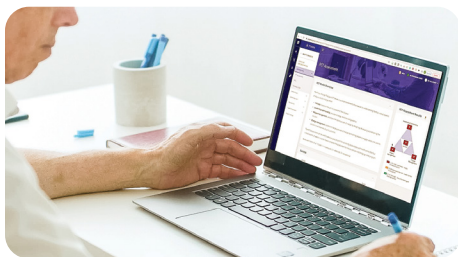
Improve Project Health

Learn to Effectively Apply the PCT Model to Improve Project Health



Understand the PCT Model

Explain the why, what, who, when and how for the Prosci Change Triangle (PCT) Model.



Prepare for a PCT Assessment

Gain commitment, identify and invite participants, and determine the appropriate approach.



Conduct a PCT Assessment

Adapt resources for individual interviews, facilitated group sessions and/or surveys.



Analyze and Act On PCT Assessment Results

Use the PCT Factor Analysis guidance to develop action plans.



Track and Adapt Actions

Conduct PCT Assessments over the project lifecycle to track improvements in project health.

How to Use This Workbook

This workbook is designed to support your achievement of the learning objectives for the Improve Project Health program. The content includes:

- Program learning objectives and agenda
- Selected content from the program slides
- All the program activities
- Links to relevant content in the Applying the PCT Model Knowledge Hub and Applications of the PCT Model Research Hub

We encourage you to use the workbook to document your insights and key learnings. The workbook also supports the completion of group activities by explaining the steps that comprise each activity and providing fillable fields to document your responses. Documenting your group's responses in the workbook will enable you to more effectively share your work with the other groups.

Notes

Agenda



- ▲ Welcome and Connection
- ▲ PCT Model Review
- ▲ Applications of the PCT Model Research
- ▲ PCT Assessment
- ▲ PCT Assessment Application Process
- ▲ Prepare to Conduct a PCT Assessment
- ▲ Extended Break
- ▲ Conduct a PCT Assessment
- ▲ Analyze and Act On PCT Assessment Results
- ▲ Track and Adapt to Improve Project Health
- ▲ Next Steps and Close

Welcome and Connection



Introductions



Expectations

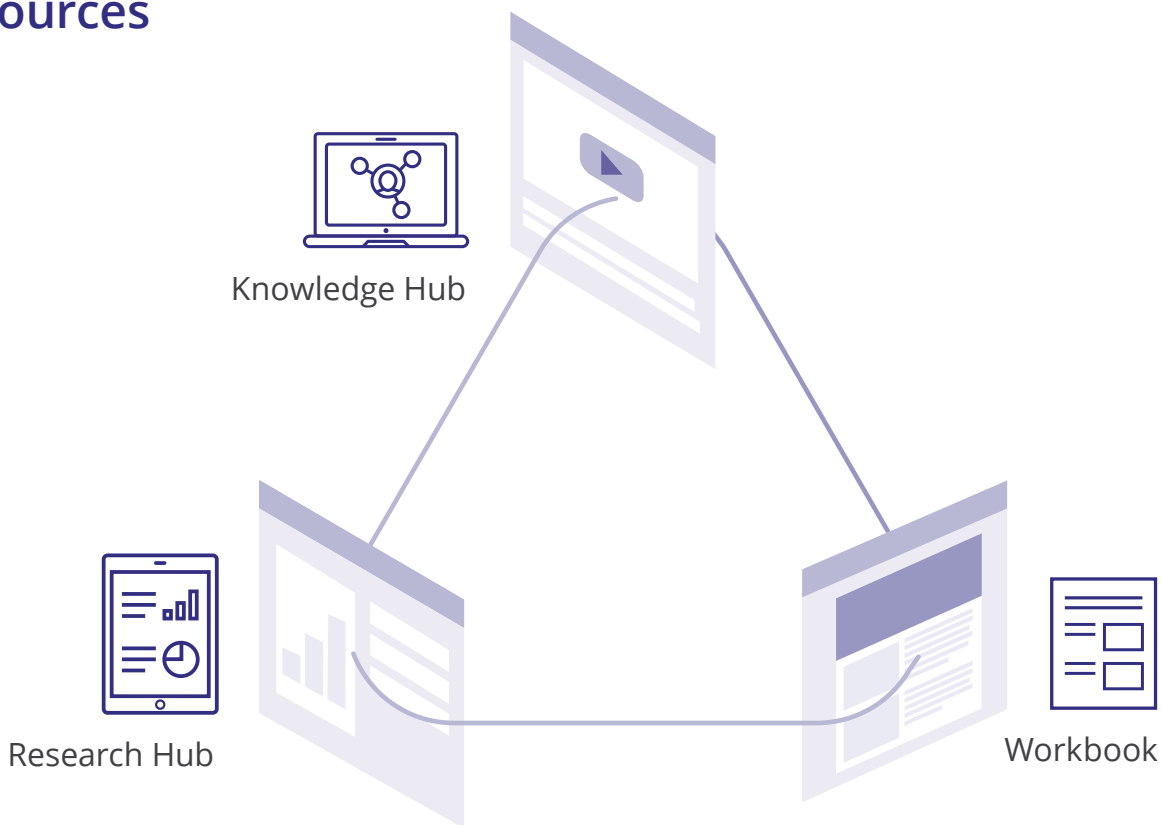


Ground Rules



Materials

Resources



Prosci Hub Solution Suite



Prosci Portal
portal.prosci.com

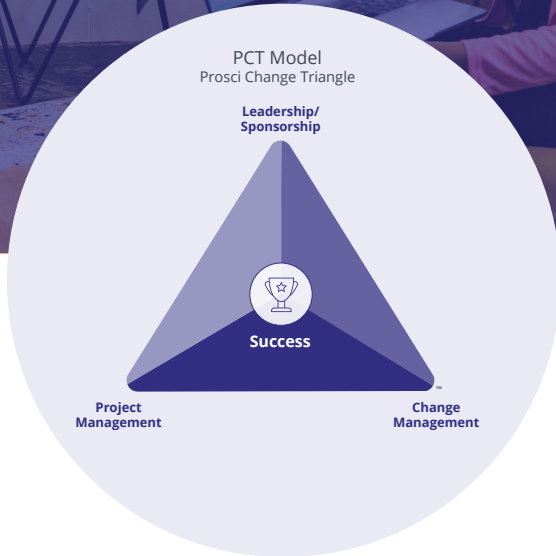


Knowledge Hub
Applying the PCT Model



Research Hub
Applications of the PCT Model

PCT Model Review



A framework that shows the four critical aspects of any successful change effort and how they are interrelated.

KNOW: What do you know or remember about the PCT Model?

LEARN: What did you learn about the PCT Model from prework?

WONDER: What is your question about applying the PCT Model?



Knowledge Hub

HELPFUL TIP: Remember to log into your [Prosci Portal](#) account before clicking on the link.

View [microlearning videos](#) in the Applying the PCT Model Knowledge Hub for an explanation of the what, why, how, who and when of the PCT Model and PCT Assessment.

Applications of the PCT Model Research

How Do You Use the PCT Model?



Assess Project Health

Knowing a project's health at a point in time can help organizations proactively address risks before they emerge. The PCT Model provides a holistic look at the factors and aspects that matter most to change success.



Align Stakeholders

Getting people to a shared vision of a change can be challenging. The PCT Model provides the anchoring factors for stakeholders to discuss and align around.



Identify Project Risks

Knowing a problem exists is different from knowing what the problem is. The PCT Model identifies 40 specific factors across four aspects that can be the source of potential risks to project success.



Track Project Progress

Knowing a project's health over time can help leaders identify and act on negative and positive trends in the trajectory of the project. The PCT Model allows practitioners to capture snapshots of project health across the project lifecycle.



Identify Adaptive Actions

Any number of potential actions can be taken on a project, but which will be the most valuable? The PCT Model offers a simple way to identify specific actions that can improve overall project health.



Inform Enterprise Change Management

Understanding patterns of project health across multiple projects can unlock enterprise insights. With the PCT Model, leaders can identify organizational strengths and areas of opportunity to increase change success.

How Do You Use the PCT Model?

1. In pairs, share how you use the PCT Model.
2. Compare your practice: What is the same? What is different? Why?
3. Debrief with the large group: What similarities or differences did you discover?

REFLECT: How do you use the PCT Model?

COMPARE: What is the same? What is different? Why?

DEBRIEF: What similarities or differences did you discover?



Research Hub

HELPFUL TIP: Remember to log into your [Prosci Portal](#) account before clicking on the link.

For additional research insights on application of the PCT Model and use cases, refer to the study, [Applications of the Prosci Change Triangle \(PCT\) Model](#) in your Research Hub.

PCT Assessment

1. Divide into four groups, one for each aspect of the PCT Model: S, L/S, PM, CM.
2. Individually, review the PCT Factor Explanations for your aspect in the Applying the PCT Model Knowledge Hub.
3. In your group, identify 2-3 factors that might require further explanation when conducting a PCT Assessment with a change team, a project team, senior leaders and key business leaders from the impacted groups.
4. Discuss ways to effectively explain the PCT factors.
5. Share the specific factors and key insights with the large group.

Aspect: (S, L/S, PM, CM)	Factor #	Insights

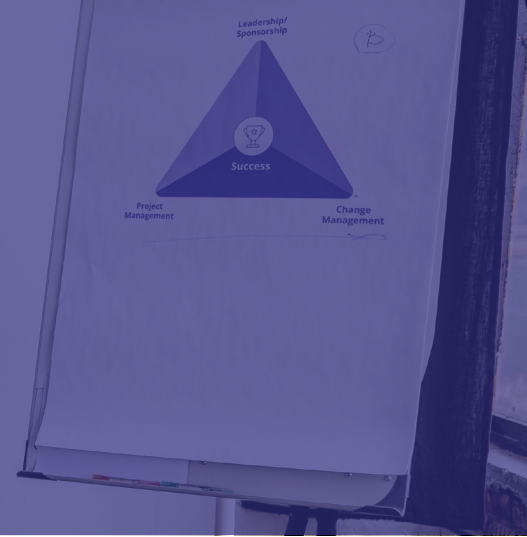


Knowledge Hub

HELPFUL TIP: Remember to log into your [Prosci Portal](#) account before clicking on the link.

Each aspect of the PCT Assessment is comprised of 10 factors, for a total of 40 factors. The PCT factors for each aspect are listed in the order that they should be addressed. The Applying the PCT Model Knowledge Hub provides a detailed explanation of each factor in the [PCT Factor Explanation](#) section.

PCT Assessment Application Process



Prepare

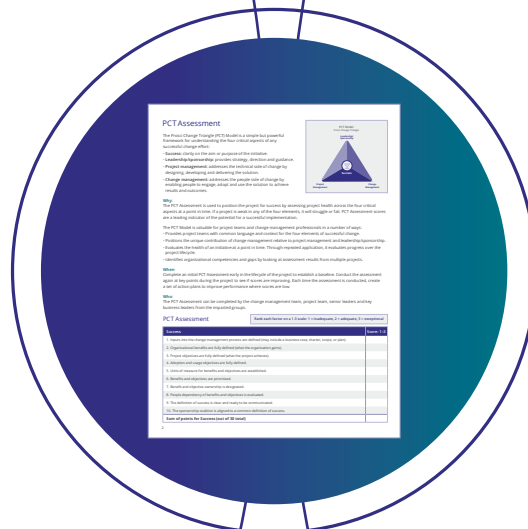
1

Prepare for a PCT Assessment by gaining commitment, identifying and inviting participants, and determining the appropriate approach.

2

Conduct

Conduct a PCT Assessment by adapting resources for individual interviews, facilitated group sessions and/or surveys.



Analyze and Act

3

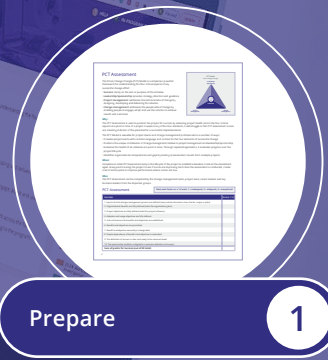
Analyze and act on PCT Assessment results by using the PCT Factor Analysis guidance and resources for sharing results.

4

Track and Adapt

Track and adapt actions to improve project health by conducting PCT Assessments over the lifecycle of the project to monitor progress in project health.

Prepare to Conduct a PCT Assessment



1. Divide into four groups:
 - Groups 1 and 2: **Primary sponsor**
 - Groups 3 and 4: **Project manager**
2. Discuss and document the three most common objections you can anticipate when trying to gain commitment from your assigned role.
3. Brainstorm and document strategies to overcome each objection.
4. Share the objections and your strategies with the large group.

	Common Objections	Strategies to Overcome Objections
Primary Sponsor		
Project Manager		



Knowledge Hub

HELPFUL TIP: Remember to log into your [Prosci Portal](#) account before clicking on the link.

To make a compelling case to gain commitment to conduct a PCT Assessment, a change practitioner should be prepared to explain:

Why assess project health using the PCT Assessment?

Why now? What are the risks and consequences of not assessing project health?

Find guidance on how to make a compelling case in the [Prepare for a PCT Assessment](#) section. Be sure to tailor your message to your audience.

Determine the Approach for Conducting the PCT Assessment

1. **Round 1:** With your partner, determine the most appropriate approach for conducting the PCT Assessment for scenario A.
 - What approach will you use for your scenario? Why?
 - What are the benefits and drawbacks of your approach?
2. **Round 2:** With your new partner, determine the most appropriate approach for scenario B.
3. **Round 3:** With your new partner, do scenario C.
4. **Round 4:** With your new partner, do scenario D.
5. **Debrief with large group:** What criteria did you consider when choosing an approach?

Scenarios	Scenario A Low-trust environment where confidentiality is required.	Scenario B Significantly different perspectives on the health of the project.	Scenario C Geographically distributed stakeholders in multiple time zones.	Scenario D Desire to build a strong sponsor coalition and shared ownership of the change.
Approach				
Why?				
Benefits/ Drawbacks				



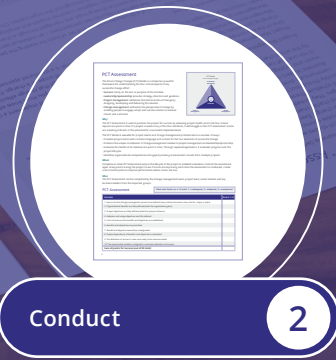
Knowledge Hub

HELPFUL TIP: Remember to log into your [Prosci Portal](#) account before clicking on the link.

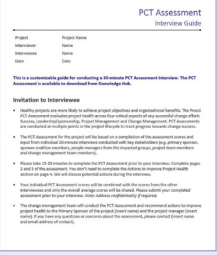


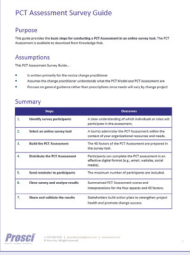
The PCT Assessment can be conducted using a number of different approaches, including individual interviews, a facilitated group session, or by using a survey. These three approaches can be used independently or in combination. In selecting the approach, the change practitioner should consider several factors including sponsor/project manager commitment, organizational culture, change maturity, confidentiality requirement, degree of misalignment, and the point in time of the project lifecycle.

Find guidance in the [Prepare for a PCT Assessment](#) section to help you determine the appropriate approach to conduct a PCT Assessment.

Conduct a PCT Assessment



Use and Adapt Resources to Conduct a PCT Assessment

<p>PCT Assessment Interview Guide</p> 	<p>PCT Assessment Facilitated Activity (60 min.)</p> 	<p>PCT Model Reflection Activity (30 min.)</p> 	<p>PCT Assessment Survey Guide</p> 
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1. Divide into four groups, one group per resource.
2. Individually, read the guidance for your resource in the Conduct a PCT Assessment section, then download and review your resource.
3. In your group, discuss and document:
 - What do you **like** about the resource?
 - How could you **use** the resource?
 - How might you **adapt** the resource?
4. Share your insights with the large group.



Knowledge Hub

HELPFUL TIP: Remember to log into your [Prosci Portal](#) account before clicking on the link.

Download customizable resources to enable you to effectively conduct PCT Assessments from the [Conduct a PCT Assessment](#) section.

How Might You Use and Adapt the Resources?

	<p>PCT Assessment Interview Guide</p> 	<p>PCT Assessment Facilitated Activity (60 min.)</p> 	<p>PCT Model Reflection Activity (30 min.)</p> 	<p>PCT Assessment Survey Guide</p> 
Like				
Use				
Adapt				

Analyze and Act On PCT Assessment Results

Four Steps to Analyzing PCT Assessment Results



Analyze and Act

3

1



Identify Strengths to Leverage

To avoid a negative reaction to the assessment results, review all four aspects, and communicate the PCT aspects and/or factors that are strengths that you can leverage.

2



Determine PCT Aspect of Greatest Risk

Consider your context and time to implementation. Identify the PCT aspect that currently poses the greatest risk to the success of the change and should be your primary focus.

3



Select PCT Factors to Address

PCT factors are listed in a logical sequence. For the PCT aspect that is your primary focus, select the specific PCT factors you should address first.

4



Recommend Actions to Improve Project Health

Consult the PCT Factor Analysis to understand the consequences of a low score and review activities, research and resources to strengthen your selected factors. Recommend actions to increase the strength of those factors.



Knowledge Hub

HELPFUL TIP: Remember to log into your [Prosci Portal](#) account before clicking on the link.

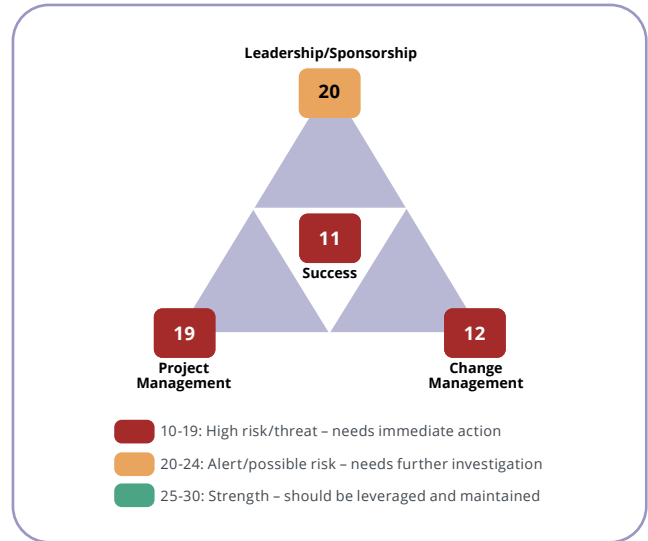
Consult the [PCT Factor Analysis](#) to understand the consequences of a low score and review activities, research and resources to strengthen your selected factors.

Case Study Analysis and Actions

You are preparing to bring together the primary sponsor, project manager and key business leaders from the impacted groups to review the PCT Assessment results and determine the actions required to improve the health of the project.

Each case study provides:

- Scenario description
- Context and observations
- PCT factor scoring
- Analysis and Actions template



Case Study: Analyze and Act on Your PCT Assessment Results

1. Divide into four groups, one for each case study.
2. Individually, review your case study.
3. In your group, follow the four steps to analyze your case study. Be sure to review the PCT Factor Analysis guidance in the Applying the PCT Model Knowledge Hub.
4. Complete your Analysis and Actions template.
5. Be prepared to present your completed Analysis and Actions template to the large group.

Notes



Knowledge Hub

HELPFUL TIP: Remember to log into your [Prosci Portal](#) account before clicking on the link.

Be sure to review the [PCT Factor Analysis](#) guidance in the Applying the PCT Model Knowledge Hub.

Case Study 1

Improve Employee Engagement and Effectiveness

Timeline: Early in the project lifecycle

- You are the change practitioner supporting the implementation of a performance management system for a financial services organization.
- The new system will impact all the functional groups in the organization.
- You joined the project team a few weeks after the project was initiated.
- One of your first engagement activities was to involve the primary sponsor, project manager and key business leaders from the impacted groups in completing a PCT Assessment.
- The assessment results provide a baseline measure of the health of the project, early in the project lifecycle.

Based on your experiences on the project to date, you have made the following observations:

- The CEO of the company is supportive of the change.
- The primary sponsor is the VP of Human Resources. They do not have authority over all the people, processes and systems that will be affected by the change.
- Defining success measures and targets for this project has been a challenge to date.
- The project involves more than just process, system and tool changes. A shift in mindset, attitudes and beliefs will also be required to ensure success.



Success

The factor scores for each PCT aspect are shown in the following tables.
Each factor is scored on a 1-3 scale: 1 = inadequate, 2 = adequate, 3 = exceptional

Factor	Score
1. Inputs into the change management process are defined (may include a business case, charter, scope, or plan).	<div style="display: flex; justify-content: space-around; width: 100px;"> 1 2 3 </div>
2. Organizational benefits are fully defined (what the organization gains).	<div style="display: flex; justify-content: space-around; width: 100px;"> 1 2 3 </div>
3. Project objectives are fully defined (what the project achieves).	<div style="display: flex; justify-content: space-around; width: 100px;"> 1 2 3 </div>
4. Adoption and usage objectives are fully defined.	<div style="display: flex; justify-content: space-around; width: 100px;"> 1 2 3 </div>
5. Units of measure for benefits and objectives are established.	<div style="display: flex; justify-content: space-around; width: 100px;"> 1 2 3 </div>
6. Benefits and objectives are prioritized.	<div style="display: flex; justify-content: space-around; width: 100px;"> 1 2 3 </div>
7. Benefit and objective ownership is designated.	<div style="display: flex; justify-content: space-around; width: 100px;"> 1 2 3 </div>
8. People dependency of benefits and objectives is evaluated.	<div style="display: flex; justify-content: space-around; width: 100px;"> 1 2 3 </div>
9. The definition of success is clear and ready to be communicated.	<div style="display: flex; justify-content: space-around; width: 100px;"> 1 2 3 </div>
10. The sponsorship coalition is aligned to a common definition of success.	<div style="display: flex; justify-content: space-around; width: 100px;"> 1 2 3 </div>
Score 11	

Leadership / Sponsorship

Factor	Score
1. The change has a primary sponsor with the necessary authority over the people, processes, and systems to authorize and fund the change.	<div style="display: flex; justify-content: space-around; width: 100px;"> 1 2 3 </div>
2. The primary sponsor can clearly explain the nature of the change, the reason for the change and the benefits for the organization.	<div style="display: flex; justify-content: space-around; width: 100px;"> 1 2 3 </div>
3. The organization has a clearly defined vision and strategy.	<div style="display: flex; justify-content: space-around; width: 100px;"> 1 2 3 </div>
4. The change is aligned with the strategy and vision for the organization.	<div style="display: flex; justify-content: space-around; width: 100px;"> 1 2 3 </div>
5. Priorities are set and communicated regarding the change and other competing priorities.	<div style="display: flex; justify-content: space-around; width: 100px;"> 1 2 3 </div>
6. The primary sponsor is resolving issues and making decisions related to the project schedule, scope and resources.	<div style="display: flex; justify-content: space-around; width: 100px;"> 1 2 3 </div>
7. The primary sponsor is actively and visibly participating throughout the lifecycle of the change.	<div style="display: flex; justify-content: space-around; width: 100px;"> 1 2 3 </div>
8. The primary sponsor is encouraging senior leaders to participate in and support the change by building a sponsor coalition.	<div style="display: flex; justify-content: space-around; width: 100px;"> 1 2 3 </div>
9. The primary sponsor is building awareness of the need for the change directly with employees.	<div style="display: flex; justify-content: space-around; width: 100px;"> 1 2 3 </div>
10. The primary sponsor is visibly reinforcing the change by celebrating successes and addressing resistance.	<div style="display: flex; justify-content: space-around; width: 100px;"> 1 2 3 </div>
Score 20	

Project Management

The factor scores for each PCT aspect are shown in the following tables.
Each factor is scored on a 1-3 scale: 1 = inadequate, 2 = adequate, 3 = exceptional

Factor	Score
1. The nature of the change is clearly defined including who is impacted and how.	<div style="display: flex; justify-content: space-around; align-items: center;"> 1 2 3 </div>
2. The project has specific objectives.	<div style="display: flex; justify-content: space-around; align-items: center;"> 1 2 3 </div>
3. The project has a clearly defined scope.	<div style="display: flex; justify-content: space-around; align-items: center;"> 1 2 3 </div>
4. The project has a project manager assigned to manage the project lifecycle.	<div style="display: flex; justify-content: space-around; align-items: center;"> 1 2 3 </div>
5. Project milestones are identified and a project schedule is complete.	<div style="display: flex; justify-content: space-around; align-items: center;"> 1 2 3 </div>
6. A work breakdown structure with deliverables is complete.	<div style="display: flex; justify-content: space-around; align-items: center;"> 1 2 3 </div>
7. Resources for the project are identified and acquired.	<div style="display: flex; justify-content: space-around; align-items: center;"> 1 2 3 </div>
8. Periodic meetings are scheduled with the project team and key stakeholders to track progress and resolve issues.	<div style="display: flex; justify-content: space-around; align-items: center;"> 1 2 3 </div>
9. The project manager understands the value of change management in ensuring the change will be adopted and used.	<div style="display: flex; justify-content: space-around; align-items: center;"> 1 2 3 </div>
10. The Change Management Plan is integrated with the Project Management Plan.	<div style="display: flex; justify-content: space-around; align-items: center;"> 1 2 3 </div>
Score 19	

Change Management

Factor	Score
1. The change is applying a structured change management approach to deliver the benefits to the organization.	<div style="display: flex; justify-content: space-around; align-items: center;"> 1 2 3 </div>
2. An assessment of the change and its impact on individuals and the organization is complete.	<div style="display: flex; justify-content: space-around; align-items: center;"> 1 2 3 </div>
3. An assessment of the change risk is complete.	<div style="display: flex; justify-content: space-around; align-items: center;"> 1 2 3 </div>
4. The change has specific adoption and usage objectives.	<div style="display: flex; justify-content: space-around; align-items: center;"> 1 2 3 </div>
5. An assessment of the strength of the sponsor coalition is complete.	<div style="display: flex; justify-content: space-around; align-items: center;"> 1 2 3 </div>
6. A customized and scaled change management strategy with the necessary sponsorship commitment is complete.	<div style="display: flex; justify-content: space-around; align-items: center;"> 1 2 3 </div>
7. The resources required to execute the change strategy and plans are identified, acquired and prepared.	<div style="display: flex; justify-content: space-around; align-items: center;"> 1 2 3 </div>
8. Change Management Plans that will mitigate resistance and achieve adoption and usage are complete and are being implemented.	<div style="display: flex; justify-content: space-around; align-items: center;"> 1 2 3 </div>
9. The effectiveness of change management is being monitored and adaptive actions are being taken if required to achieve adoption and usage.	<div style="display: flex; justify-content: space-around; align-items: center;"> 1 2 3 </div>
10. The organization is prepared to own and sustain the change.	<div style="display: flex; justify-content: space-around; align-items: center;"> 1 2 3 </div>
Score 12	

Case Study 1: Analysis and Actions

Scenario Summary

Improve employee engagement and effectiveness

Timeline

Early in the project lifecycle



1. Identify Strengths to Leverage

Looking at all four aspects, which PCT aspects and/or factors are strengths that you can leverage?

2. PCT Aspect of Greatest Risk

Which PCT aspect currently poses the greatest risk to project success and should be your primary focus? Why?

3. PCT Factors to Address

For the aspect that is your primary focus, which specific factors should you address first?

4. Actions to Improve Project Health

What actions would you recommend to increase the strength of those factors?

Case Study 2

Improve Customer Experience by Streamlining Call Handling Processes

Timeline: Go-live date is quickly approaching

- A project to improve the call handling processes in your company’s customer contact center is well underway.
- You have recently been assigned as the change practitioner on the project. The go-live date for implementing the process improvements is quickly approaching.
- The primary sponsor and project manager are concerned about increasing resistance to the project from people managers of the impacted groups and members of their teams.
- Your primary sponsor believes that an increased focus on the “people side of the change” will ensure a successful implementation.
- Your first activity was to involve the primary sponsor, project manager and key stakeholders, including the people managers of the impacted groups, in completing a PCT Assessment.
- The assessment results provide a current picture of project health prior to the go-live date.

Based on your experiences on the project to date, you have made the following observations:

- Your primary sponsor has made a commitment to the company’s CEO that they will meet the go-live date.
- The company has well-developed project management processes and primarily focuses on the technical side of changes.
- While the people managers of the impacted groups understand why the changes are needed, they have had limited involvement in the design of the changes. They are not clear on the individual benefits of the process improvements and consequently are not advocating for the change with their teams.



Success

The factor scores for each PCT aspect are shown in the following tables.
Each factor is scored on a 1-3 scale: 1 = inadequate, 2 = adequate, 3 = exceptional

Factor	Score
1. Inputs into the change management process are defined (may include a business case, charter, scope, or plan).	<div style="display: flex; justify-content: space-between; width: 100px;"> 1 2 3 </div>
2. Organizational benefits are fully defined (what the organization gains).	<div style="display: flex; justify-content: space-between; width: 100px;"> 1 2 3 </div>
3. Project objectives are fully defined (what the project achieves).	<div style="display: flex; justify-content: space-between; width: 100px;"> 1 2 3 </div>
4. Adoption and usage objectives are fully defined.	<div style="display: flex; justify-content: space-between; width: 100px;"> 1 2 3 </div>
5. Units of measure for benefits and objectives are established.	<div style="display: flex; justify-content: space-between; width: 100px;"> 1 2 3 </div>
6. Benefits and objectives are prioritized.	<div style="display: flex; justify-content: space-between; width: 100px;"> 1 2 3 </div>
7. Benefit and objective ownership is designated.	<div style="display: flex; justify-content: space-between; width: 100px;"> 1 2 3 </div>
8. People dependency of benefits and objectives is evaluated.	<div style="display: flex; justify-content: space-between; width: 100px;"> 1 2 3 </div>
9. The definition of success is clear and ready to be communicated.	<div style="display: flex; justify-content: space-between; width: 100px;"> 1 2 3 </div>
10. The sponsorship coalition is aligned to a common definition of success.	<div style="display: flex; justify-content: space-between; width: 100px;"> 1 2 3 </div>
Score 18	

Leadership / Sponsorship

Factor	Score
1. The change has a primary sponsor with the necessary authority over the people, processes, and systems to authorize and fund the change.	<div style="display: flex; justify-content: space-between; width: 100px;"> 1 2 3 </div>
2. The primary sponsor can clearly explain the nature of the change, the reason for the change and the benefits for the organization.	<div style="display: flex; justify-content: space-between; width: 100px;"> 1 2 3 </div>
3. The organization has a clearly defined vision and strategy.	<div style="display: flex; justify-content: space-between; width: 100px;"> 1 2 3 </div>
4. The change is aligned with the strategy and vision for the organization.	<div style="display: flex; justify-content: space-between; width: 100px;"> 1 2 3 </div>
5. Priorities are set and communicated regarding the change and other competing priorities.	<div style="display: flex; justify-content: space-between; width: 100px;"> 1 2 3 </div>
6. The primary sponsor is resolving issues and making decisions related to the project schedule, scope and resources.	<div style="display: flex; justify-content: space-between; width: 100px;"> 1 2 3 </div>
7. The primary sponsor is actively and visibly participating throughout the lifecycle of the change.	<div style="display: flex; justify-content: space-between; width: 100px;"> 1 2 3 </div>
8. The primary sponsor is encouraging senior leaders to participate in and support the change by building a sponsor coalition.	<div style="display: flex; justify-content: space-between; width: 100px;"> 1 2 3 </div>
9. The primary sponsor is building awareness of the need for the change directly with employees.	<div style="display: flex; justify-content: space-between; width: 100px;"> 1 2 3 </div>
10. The primary sponsor is visibly reinforcing the change by celebrating successes and addressing resistance.	<div style="display: flex; justify-content: space-between; width: 100px;"> 1 2 3 </div>
Score 21	

Project Management

The factor scores for each PCT aspect are shown in the following tables.
Each factor is scored on a 1-3 scale: 1 = inadequate, 2 = adequate, 3 = exceptional

Factor	Score
1. The nature of the change is clearly defined including who is impacted and how.	<div style="display: flex; align-items: center;"> <div style="border: 1px solid #ccc; border-radius: 15px; padding: 2px 10px; margin-right: 5px;">1</div> <div style="border: 1px solid #ccc; border-radius: 15px; padding: 2px 10px; margin-right: 5px;">2</div> <div style="background-color: #1a3d54; color: white; border: 1px solid #ccc; border-radius: 15px; padding: 2px 10px;">3</div> <div style="margin-left: 10px;"></div> </div>
2. The project has specific objectives.	<div style="display: flex; align-items: center;"> <div style="border: 1px solid #ccc; border-radius: 15px; padding: 2px 10px; margin-right: 5px;">1</div> <div style="border: 1px solid #ccc; border-radius: 15px; padding: 2px 10px; margin-right: 5px;">2</div> <div style="background-color: #1a3d54; color: white; border: 1px solid #ccc; border-radius: 15px; padding: 2px 10px;">3</div> <div style="margin-left: 10px;"></div> </div>
3. The project has a clearly defined scope.	<div style="display: flex; align-items: center;"> <div style="border: 1px solid #ccc; border-radius: 15px; padding: 2px 10px; margin-right: 5px;">1</div> <div style="border: 1px solid #ccc; border-radius: 15px; padding: 2px 10px; margin-right: 5px;">2</div> <div style="background-color: #1a3d54; color: white; border: 1px solid #ccc; border-radius: 15px; padding: 2px 10px;">3</div> <div style="margin-left: 10px;"></div> </div>
4. The project has a project manager assigned to manage the project lifecycle.	<div style="display: flex; align-items: center;"> <div style="border: 1px solid #ccc; border-radius: 15px; padding: 2px 10px; margin-right: 5px;">1</div> <div style="border: 1px solid #ccc; border-radius: 15px; padding: 2px 10px; margin-right: 5px;">2</div> <div style="background-color: #1a3d54; color: white; border: 1px solid #ccc; border-radius: 15px; padding: 2px 10px;">3</div> <div style="margin-left: 10px;"></div> </div>
5. Project milestones are identified and a project schedule is complete.	<div style="display: flex; align-items: center;"> <div style="border: 1px solid #ccc; border-radius: 15px; padding: 2px 10px; margin-right: 5px;">1</div> <div style="border: 1px solid #ccc; border-radius: 15px; padding: 2px 10px; margin-right: 5px;">2</div> <div style="background-color: #1a3d54; color: white; border: 1px solid #ccc; border-radius: 15px; padding: 2px 10px;">3</div> <div style="margin-left: 10px;"></div> </div>
6. A work breakdown structure with deliverables is complete.	<div style="display: flex; align-items: center;"> <div style="border: 1px solid #ccc; border-radius: 15px; padding: 2px 10px; margin-right: 5px;">1</div> <div style="border: 1px solid #ccc; border-radius: 15px; padding: 2px 10px; margin-right: 5px;">2</div> <div style="background-color: #1a3d54; color: white; border: 1px solid #ccc; border-radius: 15px; padding: 2px 10px;">3</div> <div style="margin-left: 10px;"></div> </div>
7. Resources for the project are identified and acquired.	<div style="display: flex; align-items: center;"> <div style="border: 1px solid #ccc; border-radius: 15px; padding: 2px 10px; margin-right: 5px;">1</div> <div style="border: 1px solid #ccc; border-radius: 15px; padding: 2px 10px; margin-right: 5px;">2</div> <div style="background-color: #1a3d54; color: white; border: 1px solid #ccc; border-radius: 15px; padding: 2px 10px;">3</div> <div style="margin-left: 10px;"></div> </div>
8. Periodic meetings are scheduled with the project team and key stakeholders to track progress and resolve issues.	<div style="display: flex; align-items: center;"> <div style="border: 1px solid #ccc; border-radius: 15px; padding: 2px 10px; margin-right: 5px;">1</div> <div style="background-color: #1a3d54; color: white; border: 1px solid #ccc; border-radius: 15px; padding: 2px 10px; margin-right: 5px;">2</div> <div style="border: 1px solid #ccc; border-radius: 15px; padding: 2px 10px;">3</div> <div style="margin-left: 10px;"></div> </div>
9. The project manager understands the value of change management in ensuring the change will be adopted and used.	<div style="display: flex; align-items: center;"> <div style="background-color: #1a3d54; color: white; border: 1px solid #ccc; border-radius: 15px; padding: 2px 10px; margin-right: 5px;">1</div> <div style="border: 1px solid #ccc; border-radius: 15px; padding: 2px 10px; margin-right: 5px;">2</div> <div style="border: 1px solid #ccc; border-radius: 15px; padding: 2px 10px;">3</div> <div style="margin-left: 10px;"></div> </div>
10. The Change Management Plan is integrated with the Project Management Plan.	<div style="display: flex; align-items: center;"> <div style="background-color: #1a3d54; color: white; border: 1px solid #ccc; border-radius: 15px; padding: 2px 10px; margin-right: 5px;">1</div> <div style="border: 1px solid #ccc; border-radius: 15px; padding: 2px 10px; margin-right: 5px;">2</div> <div style="border: 1px solid #ccc; border-radius: 15px; padding: 2px 10px;">3</div> <div style="margin-left: 10px;"></div> </div>
Score 25	

Change Management

Factor	Score
1. The change is applying a structured change management approach to deliver the benefits to the organization.	<div style="display: flex; align-items: center;"> <div style="background-color: #1a3d54; color: white; border: 1px solid #ccc; border-radius: 15px; padding: 2px 10px; margin-right: 5px;">1</div> <div style="border: 1px solid #ccc; border-radius: 15px; padding: 2px 10px; margin-right: 5px;">2</div> <div style="border: 1px solid #ccc; border-radius: 15px; padding: 2px 10px;">3</div> <div style="margin-left: 10px;"></div> </div>
2. An assessment of the change and its impact on individuals and the organization is complete.	<div style="display: flex; align-items: center;"> <div style="background-color: #1a3d54; color: white; border: 1px solid #ccc; border-radius: 15px; padding: 2px 10px; margin-right: 5px;">1</div> <div style="border: 1px solid #ccc; border-radius: 15px; padding: 2px 10px; margin-right: 5px;">2</div> <div style="border: 1px solid #ccc; border-radius: 15px; padding: 2px 10px;">3</div> <div style="margin-left: 10px;"></div> </div>
3. An assessment of the change risk is complete.	<div style="display: flex; align-items: center;"> <div style="background-color: #1a3d54; color: white; border: 1px solid #ccc; border-radius: 15px; padding: 2px 10px; margin-right: 5px;">1</div> <div style="border: 1px solid #ccc; border-radius: 15px; padding: 2px 10px; margin-right: 5px;">2</div> <div style="border: 1px solid #ccc; border-radius: 15px; padding: 2px 10px;">3</div> <div style="margin-left: 10px;"></div> </div>
4. The change has specific adoption and usage objectives.	<div style="display: flex; align-items: center;"> <div style="background-color: #1a3d54; color: white; border: 1px solid #ccc; border-radius: 15px; padding: 2px 10px; margin-right: 5px;">1</div> <div style="border: 1px solid #ccc; border-radius: 15px; padding: 2px 10px; margin-right: 5px;">2</div> <div style="border: 1px solid #ccc; border-radius: 15px; padding: 2px 10px;">3</div> <div style="margin-left: 10px;"></div> </div>
5. An assessment of the strength of the sponsor coalition is complete.	<div style="display: flex; align-items: center;"> <div style="background-color: #1a3d54; color: white; border: 1px solid #ccc; border-radius: 15px; padding: 2px 10px; margin-right: 5px;">1</div> <div style="border: 1px solid #ccc; border-radius: 15px; padding: 2px 10px; margin-right: 5px;">2</div> <div style="border: 1px solid #ccc; border-radius: 15px; padding: 2px 10px;">3</div> <div style="margin-left: 10px;"></div> </div>
6. A customized and scaled change management strategy with the necessary sponsorship commitment is complete.	<div style="display: flex; align-items: center;"> <div style="background-color: #1a3d54; color: white; border: 1px solid #ccc; border-radius: 15px; padding: 2px 10px; margin-right: 5px;">1</div> <div style="border: 1px solid #ccc; border-radius: 15px; padding: 2px 10px; margin-right: 5px;">2</div> <div style="border: 1px solid #ccc; border-radius: 15px; padding: 2px 10px;">3</div> <div style="margin-left: 10px;"></div> </div>
7. The resources required to execute the change strategy and plans are identified, acquired and prepared.	<div style="display: flex; align-items: center;"> <div style="background-color: #1a3d54; color: white; border: 1px solid #ccc; border-radius: 15px; padding: 2px 10px; margin-right: 5px;">1</div> <div style="border: 1px solid #ccc; border-radius: 15px; padding: 2px 10px; margin-right: 5px;">2</div> <div style="border: 1px solid #ccc; border-radius: 15px; padding: 2px 10px;">3</div> <div style="margin-left: 10px;"></div> </div>
8. Change Management Plans that will mitigate resistance and achieve adoption and usage are complete and are being implemented.	<div style="display: flex; align-items: center;"> <div style="background-color: #1a3d54; color: white; border: 1px solid #ccc; border-radius: 15px; padding: 2px 10px; margin-right: 5px;">1</div> <div style="border: 1px solid #ccc; border-radius: 15px; padding: 2px 10px; margin-right: 5px;">2</div> <div style="border: 1px solid #ccc; border-radius: 15px; padding: 2px 10px;">3</div> <div style="margin-left: 10px;"></div> </div>
9. The effectiveness of change management is being monitored and adaptive actions are being taken if required to achieve adoption and usage.	<div style="display: flex; align-items: center;"> <div style="background-color: #1a3d54; color: white; border: 1px solid #ccc; border-radius: 15px; padding: 2px 10px; margin-right: 5px;">1</div> <div style="border: 1px solid #ccc; border-radius: 15px; padding: 2px 10px; margin-right: 5px;">2</div> <div style="border: 1px solid #ccc; border-radius: 15px; padding: 2px 10px;">3</div> <div style="margin-left: 10px;"></div> </div>
10. The organization is prepared to own and sustain the change.	<div style="display: flex; align-items: center;"> <div style="background-color: #1a3d54; color: white; border: 1px solid #ccc; border-radius: 15px; padding: 2px 10px; margin-right: 5px;">1</div> <div style="border: 1px solid #ccc; border-radius: 15px; padding: 2px 10px; margin-right: 5px;">2</div> <div style="border: 1px solid #ccc; border-radius: 15px; padding: 2px 10px;">3</div> <div style="margin-left: 10px;"></div> </div>
Score 10	

Case Study 2: Analysis and Actions

Scenario Summary

Improve customer experience by streamlining call handling processes

Timeline

Go-live date is quickly approaching



1. Identify Strengths to Leverage

Looking at all four aspects, which PCT aspects and/or factors are strengths that you can leverage?

2. PCT Aspect of Greatest Risk

Which PCT aspect currently poses the greatest risk to project success and should be your primary focus? Why?

3. PCT Factors to Address

For the aspect that is your primary focus, which specific factors should you address first?

4. Actions to Improve Project Health

What actions would you recommend to increase the strength of those factors?

Case Study 3

Improve Safety of High-Hazard Workers by Adopting Life-Saving Rules

Timeline: Early in the project lifecycle

- You are the change practitioner on a project to improve safety performance at an energy company.
- The success of the project is dependent on shifting the mindset and behavior of employees who perform high-hazard work on oil and gas production equipment.
- One of the behaviors that needs to change is some workers not following standard operating procedures and taking “shortcuts” to save time and effort.
- This behavior puts the workers and the company at higher risk than the company considers to be safe.
- The purpose of the project is to develop and implement a set of life-saving rules that, if followed, will eliminate unacceptable risks and reduce the possibility of severe injuries or death.
- One of your first engagement activities was to involve the primary sponsor, project manager and key business leaders from the impacted groups in completing a PCT Assessment.
- The assessment results provide a baseline measure of the health of the project, early in the project lifecycle.

Based on your experiences on the project to date, you have made the following observations:

- Your primary sponsor has significant experience leading capital projects, such as building new infrastructure to enable energy production. Sponsoring a behavioral change initiative is new to them and they are relying heavily on the project manager to develop the “right” solution.
- The company uses a structured project management approach which has proven effective for use on capital projects.
- While the project manager is highly skilled at developing and supporting the execution of project plans for capital projects, they are struggling to adapt the structured approach for use on this project.
- Employees from the impacted groups have complained that they have not been consulted on the development of the life-saving rules. They are concerned that they will be forced to comply with a set of rules they don’t agree with.



Success

The factor scores for each PCT aspect are shown in the following tables.
Each factor is scored on a 1-3 scale: 1 = inadequate, 2 = adequate, 3 = exceptional











Factor	Score
1. Inputs into the change management process are defined (may include a business case, charter, scope, or plan).	
2. Organizational benefits are fully defined (what the organization gains).	
3. Project objectives are fully defined (what the project achieves).	
4. Adoption and usage objectives are fully defined.	
5. Units of measure for benefits and objectives are established.	
6. Benefits and objectives are prioritized.	
7. Benefit and objective ownership is designated.	
8. People dependency of benefits and objectives is evaluated.	
9. The definition of success is clear and ready to be communicated.	
10. The sponsorship coalition is aligned to a common definition of success.	
Score 16	

Leadership / Sponsorship











Factor	Score
1. The change has a primary sponsor with the necessary authority over the people, processes, and systems to authorize and fund the change.	
2. The primary sponsor can clearly explain the nature of the change, the reason for the change and the benefits for the organization.	
3. The organization has a clearly defined vision and strategy.	
4. The change is aligned with the strategy and vision for the organization.	
5. Priorities are set and communicated regarding the change and other competing priorities.	
6. The primary sponsor is resolving issues and making decisions related to the project schedule, scope and resources.	
7. The primary sponsor is actively and visibly participating throughout the lifecycle of the change.	
8. The primary sponsor is encouraging senior leaders to participate in and support the change by building a sponsor coalition.	
9. The primary sponsor is building awareness of the need for the change directly with employees.	
10. The primary sponsor is visibly reinforcing the change by celebrating successes and addressing resistance.	
Score 20	

Project Management

The factor scores for each PCT aspect are shown in the following tables.
Each factor is scored on a 1-3 scale: 1 = inadequate, 2 = adequate, 3 = exceptional

Factor	Score
1. The nature of the change is clearly defined including who is impacted and how.	<input checked="" type="radio"/> 1 <input type="radio"/> 2 <input type="radio"/> 3 
2. The project has specific objectives.	<input checked="" type="radio"/> 1 <input type="radio"/> 2 <input type="radio"/> 3 
3. The project has a clearly defined scope.	<input checked="" type="radio"/> 1 <input type="radio"/> 2 <input type="radio"/> 3 
4. The project has a project manager assigned to manage the project lifecycle.	<input type="radio"/> 1 <input checked="" type="radio"/> 2 <input type="radio"/> 3 
5. Project milestones are identified and a project schedule is complete.	<input checked="" type="radio"/> 1 <input type="radio"/> 2 <input type="radio"/> 3 
6. A work breakdown structure with deliverables is complete.	<input checked="" type="radio"/> 1 <input type="radio"/> 2 <input type="radio"/> 3 
7. Resources for the project are identified and acquired.	<input checked="" type="radio"/> 1 <input type="radio"/> 2 <input type="radio"/> 3 
8. Periodic meetings are scheduled with the project team and key stakeholders to track progress and resolve issues.	<input checked="" type="radio"/> 1 <input type="radio"/> 2 <input type="radio"/> 3 
9. The project manager understands the value of change management in ensuring the change will be adopted and used.	<input checked="" type="radio"/> 1 <input type="radio"/> 2 <input type="radio"/> 3 
10. The Change Management Plan is integrated with the Project Management Plan.	<input checked="" type="radio"/> 1 <input type="radio"/> 2 <input type="radio"/> 3 
Score 11	

Change Management

Factor	Score
1. The change is applying a structured change management approach to deliver the benefits to the organization.	<input type="radio"/> 1 <input type="radio"/> 2 <input checked="" type="radio"/> 3 
2. An assessment of the change and its impact on individuals and the organization is complete.	<input checked="" type="radio"/> 1 <input type="radio"/> 2 <input type="radio"/> 3 
3. An assessment of the change risk is complete.	<input checked="" type="radio"/> 1 <input type="radio"/> 2 <input type="radio"/> 3 
4. The change has specific adoption and usage objectives.	<input checked="" type="radio"/> 1 <input type="radio"/> 2 <input type="radio"/> 3 
5. An assessment of the strength of the sponsor coalition is complete.	<input checked="" type="radio"/> 1 <input type="radio"/> 2 <input type="radio"/> 3 
6. A customized and scaled change management strategy with the necessary sponsorship commitment is complete.	<input checked="" type="radio"/> 1 <input type="radio"/> 2 <input type="radio"/> 3 
7. The resources required to execute the change strategy and plans are identified, acquired and prepared.	<input checked="" type="radio"/> 1 <input type="radio"/> 2 <input type="radio"/> 3 
8. Change Management Plans that will mitigate resistance and achieve adoption and usage are complete and are being implemented.	<input checked="" type="radio"/> 1 <input type="radio"/> 2 <input type="radio"/> 3 
9. The effectiveness of change management is being monitored and adaptive actions are being taken if required to achieve adoption and usage.	<input checked="" type="radio"/> 1 <input type="radio"/> 2 <input type="radio"/> 3 
10. The organization is prepared to own and sustain the change.	<input checked="" type="radio"/> 1 <input type="radio"/> 2 <input type="radio"/> 3 
Score 12	

Case Study 3: Analysis and Actions

Scenario Summary

Improve safety of high-hazard workers by adopting life-saving rules

Timeline

Early in the project lifecycle



1. Identify Strengths to Leverage

Looking at all four aspects, which PCT aspects and/or factors are strengths that you can leverage?

2. PCT Aspect of Greatest Risk

Which PCT aspect currently poses the greatest risk to project success and should be your primary focus? Why?

3. PCT Factors to Address

For the aspect that is your primary focus, which specific factors should you address first?

4. Actions to Improve Project Health

What actions would you recommend to increase the strength of those factors?

Case Study 4

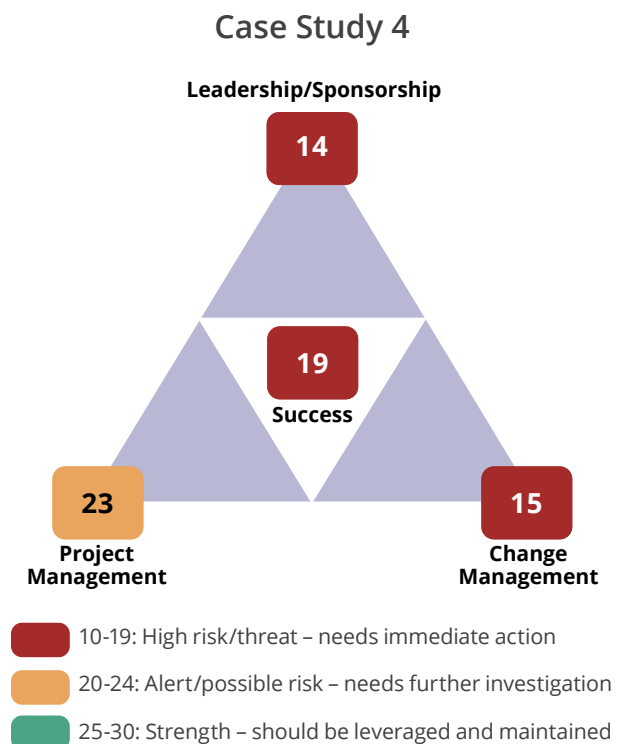
Achieve Compliance With New Government Policy

Timeline: Must be able to demonstrate compliance in 110 days

- You are the change practitioner on a project that your company has initiated to ensure compliance with a new government policy that has just become law.
- The changes required to achieve compliance are significant and have enterprise-wide impacts.
- The government requires that all organizations that fall under the scope of the new policy must be able to demonstrate compliance within 120 days.
- You are 10 days into the project and recently engaged the primary sponsor, project manager and key business leaders from the impacted groups to review the PCT Assessment results and determine the activities required to improve the health of the project.

Based on your brief experience on the project to date, you have made the following observations:

- Because this is a compliance project, there is limited attention being paid to the initiative compared to other projects underway in the organization. This is despite the fact that failure to comply creates a reputational risk for the organization and is accompanied by a substantial fine.
- The primary sponsor was assigned to the project and is from the functional group that needs to make the most significant changes to ensure compliance with the new policy. They are a mid-level manager and have limited authority with respect to the other functional groups that also need to implement changes.
- The project team has just over 100 days to implement the changes required to ensure compliance. Despite the best efforts of the project manager and you, the project is struggling.



Success

The factor scores for each PCT aspect are shown in the following tables.
Each factor is scored on a 1-3 scale: 1 = inadequate, 2 = adequate, 3 = exceptional

Factor	Score
1. Inputs into the change management process are defined (may include a business case, charter, scope, or plan).	<div style="display: flex; justify-content: space-around; width: 100px;"> 1 2 3 </div>
2. Organizational benefits are fully defined (what the organization gains).	<div style="display: flex; justify-content: space-around; width: 100px;"> 1 2 3 </div>
3. Project objectives are fully defined (what the project achieves).	<div style="display: flex; justify-content: space-around; width: 100px;"> 1 2 3 </div>
4. Adoption and usage objectives are fully defined.	<div style="display: flex; justify-content: space-around; width: 100px;"> 1 2 3 </div>
5. Units of measure for benefits and objectives are established.	<div style="display: flex; justify-content: space-around; width: 100px;"> 1 2 3 </div>
6. Benefits and objectives are prioritized.	<div style="display: flex; justify-content: space-around; width: 100px;"> 1 2 3 </div>
7. Benefit and objective ownership is designated.	<div style="display: flex; justify-content: space-around; width: 100px;"> 1 2 3 </div>
8. People dependency of benefits and objectives is evaluated.	<div style="display: flex; justify-content: space-around; width: 100px;"> 1 2 3 </div>
9. The definition of success is clear and ready to be communicated.	<div style="display: flex; justify-content: space-around; width: 100px;"> 1 2 3 </div>
10. The sponsorship coalition is aligned to a common definition of success.	<div style="display: flex; justify-content: space-around; width: 100px;"> 1 2 3 </div>
Score 19	

Leadership / Sponsorship

Factor	Score
1. The change has a primary sponsor with the necessary authority over the people, processes, and systems to authorize and fund the change.	<div style="display: flex; justify-content: space-around; width: 100px;"> 1 2 3 </div>
2. The primary sponsor can clearly explain the nature of the change, the reason for the change and the benefits for the organization.	<div style="display: flex; justify-content: space-around; width: 100px;"> 1 2 3 </div>
3. The organization has a clearly defined vision and strategy.	<div style="display: flex; justify-content: space-around; width: 100px;"> 1 2 3 </div>
4. The change is aligned with the strategy and vision for the organization.	<div style="display: flex; justify-content: space-around; width: 100px;"> 1 2 3 </div>
5. Priorities are set and communicated regarding the change and other competing priorities.	<div style="display: flex; justify-content: space-around; width: 100px;"> 1 2 3 </div>
6. The primary sponsor is resolving issues and making decisions related to the project schedule, scope and resources.	<div style="display: flex; justify-content: space-around; width: 100px;"> 1 2 3 </div>
7. The primary sponsor is actively and visibly participating throughout the lifecycle of the change.	<div style="display: flex; justify-content: space-around; width: 100px;"> 1 2 3 </div>
8. The primary sponsor is encouraging senior leaders to participate in and support the change by building a sponsor coalition.	<div style="display: flex; justify-content: space-around; width: 100px;"> 1 2 3 </div>
9. The primary sponsor is building awareness of the need for the change directly with employees.	<div style="display: flex; justify-content: space-around; width: 100px;"> 1 2 3 </div>
10. The primary sponsor is visibly reinforcing the change by celebrating successes and addressing resistance.	<div style="display: flex; justify-content: space-around; width: 100px;"> 1 2 3 </div>
Score 14	

Project Management

The factor scores for each PCT aspect are shown in the following tables.
Each factor is scored on a 1-3 scale: 1 = inadequate, 2 = adequate, 3 = exceptional

Factor	Score
1. The nature of the change is clearly defined including who is impacted and how.	<div style="display: flex; justify-content: space-between; width: 100px;"> 1 2 3 </div>
2. The project has specific objectives.	<div style="display: flex; justify-content: space-between; width: 100px;"> 1 2 3 </div>
3. The project has a clearly defined scope.	<div style="display: flex; justify-content: space-between; width: 100px;"> 1 2 3 </div>
4. The project has a project manager assigned to manage the project lifecycle.	<div style="display: flex; justify-content: space-between; width: 100px;"> 1 2 3 </div>
5. Project milestones are identified and a project schedule is complete.	<div style="display: flex; justify-content: space-between; width: 100px;"> 1 2 3 </div>
6. A work breakdown structure with deliverables is complete.	<div style="display: flex; justify-content: space-between; width: 100px;"> 1 2 3 </div>
7. Resources for the project are identified and acquired.	<div style="display: flex; justify-content: space-between; width: 100px;"> 1 2 3 </div>
8. Periodic meetings are scheduled with the project team and key stakeholders to track progress and resolve issues.	<div style="display: flex; justify-content: space-between; width: 100px;"> 1 2 3 </div>
9. The project manager understands the value of change management in ensuring the change will be adopted and used.	<div style="display: flex; justify-content: space-between; width: 100px;"> 1 2 3 </div>
10. The Change Management Plan is integrated with the Project Management Plan.	<div style="display: flex; justify-content: space-between; width: 100px;"> 1 2 3 </div>
Score 23	

Change Management

Factor	Score
1. The change is applying a structured change management approach to deliver the benefits to the organization.	<div style="display: flex; justify-content: space-between; width: 100px;"> 1 2 3 </div>
2. An assessment of the change and its impact on individuals and the organization is complete.	<div style="display: flex; justify-content: space-between; width: 100px;"> 1 2 3 </div>
3. An assessment of the change risk is complete.	<div style="display: flex; justify-content: space-between; width: 100px;"> 1 2 3 </div>
4. The change has specific adoption and usage objectives.	<div style="display: flex; justify-content: space-between; width: 100px;"> 1 2 3 </div>
5. An assessment of the strength of the sponsor coalition is complete.	<div style="display: flex; justify-content: space-between; width: 100px;"> 1 2 3 </div>
6. A customized and scaled change management strategy with the necessary sponsorship commitment is complete.	<div style="display: flex; justify-content: space-between; width: 100px;"> 1 2 3 </div>
7. The resources required to execute the change strategy and plans are identified, acquired and prepared.	<div style="display: flex; justify-content: space-between; width: 100px;"> 1 2 3 </div>
8. Change Management Plans that will mitigate resistance and achieve adoption and usage are complete and are being implemented.	<div style="display: flex; justify-content: space-between; width: 100px;"> 1 2 3 </div>
9. The effectiveness of change management is being monitored and adaptive actions are being taken if required to achieve adoption and usage.	<div style="display: flex; justify-content: space-between; width: 100px;"> 1 2 3 </div>
10. The organization is prepared to own and sustain the change.	<div style="display: flex; justify-content: space-between; width: 100px;"> 1 2 3 </div>
Score 15	

Case Study 4: Analysis and Actions

Scenario Summary

Achieve compliance with new government policy

Timeline

Must be able to demonstrate compliance in 110 days



1. Identify Strengths to Leverage

Looking at all four aspects, which PCT aspects and/or factors are strengths that you can leverage?

2. PCT Aspect of Greatest Risk

Which PCT aspect currently poses the greatest risk to project success and should be your primary focus? Why?

3. PCT Factors to Address

For the aspect that is your primary focus, which specific factors should you address first?

4. Actions to Improve Project Health

What actions would you recommend to increase the strength of those factors?

Case Study Notes



Knowledge Hub

HELPFUL TIP: Remember to log into your [Prosci Portal](#) account before clicking on the link.

Use a collaborative approach to sharing PCT Assessment results and recommended actions. This will help you to gain commitment to required actions.

Use the [PCT Assessment Results and Actions customizable slide deck](#) to capture your summary and report out on actions.

PCT Assessment Planning Checklist

- When in the project lifecycle will you conduct the PCT Assessment?
- Who will complete the PCT Assessment?
- What approach will you use to conduct the PCT Assessment?
- How will you document PCT Assessment scores?
- How will you determine the actions you will recommend to improve project health?
- How will you share the results and recommended actions?
- When will you schedule the next PCT Assessment to track progress?

Notes

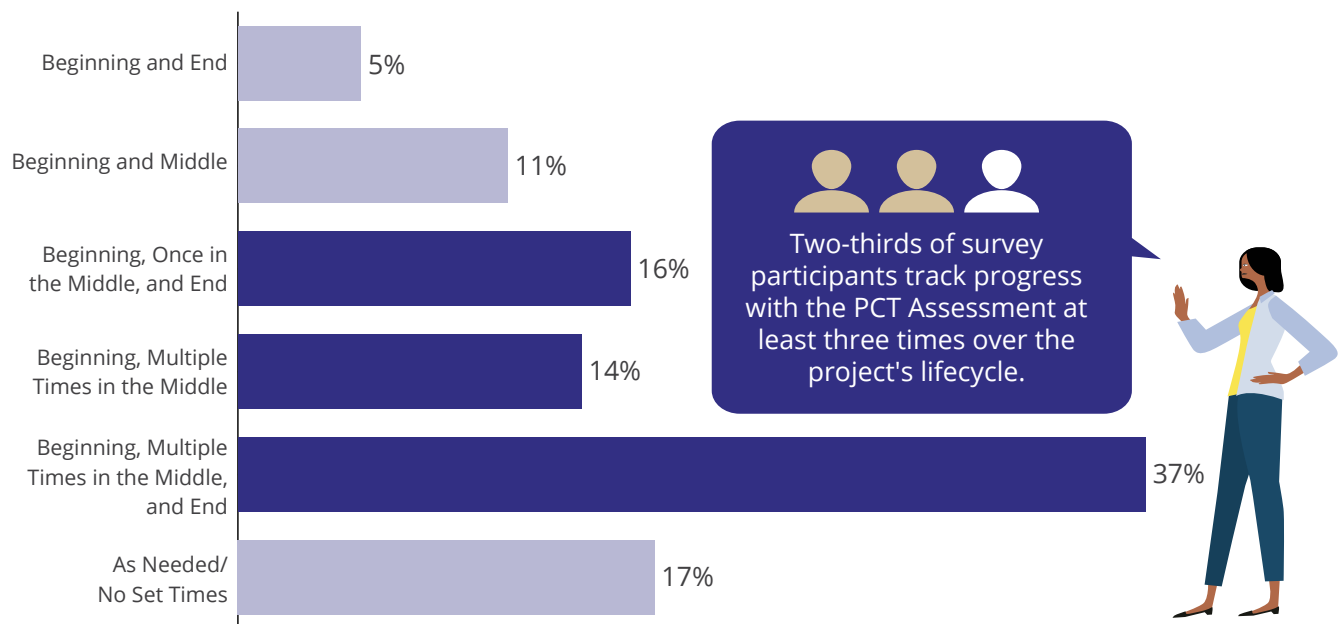
Track and Adapt to Improve Project Health



Track and Adapt

4

When Do People Conduct PCT Assessments?



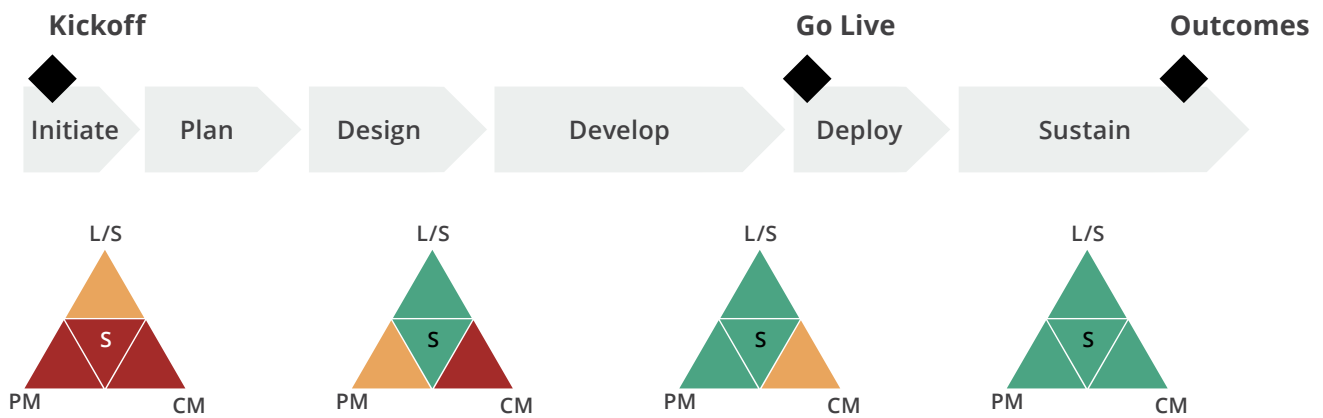
What are the benefits of repeating PCT Assessments over the lifecycle of the project?

When to Conduct PCT Assessments

Sequential Change

Score Interpretation

- 10-19: High risk/threat – needs immediate action
- 20-24: Alert/possible risk – needs further investigation
- 25-30: Strength – should be leveraged and maintained



Notes

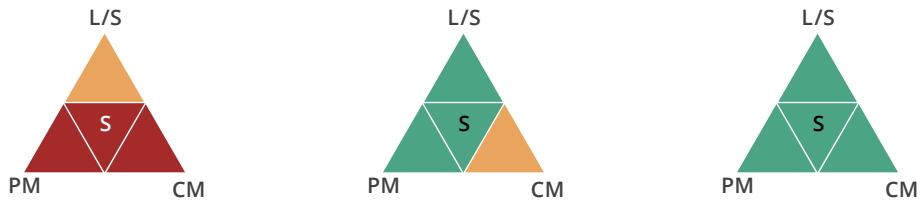
Empty box for notes.

When to Conduct PCT Assessments

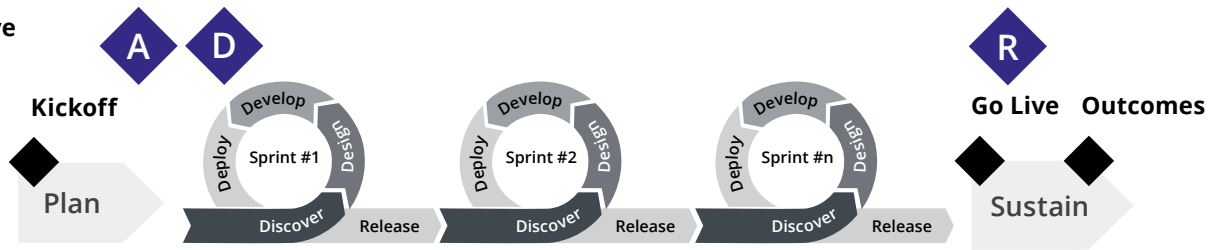
Iterative Change

Score Interpretation

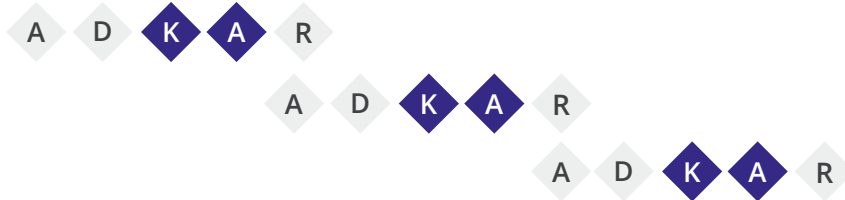
- 10-19: High risk/threat - needs immediate action
- 20-24: Alert/possible risk - needs further investigation
- 25-30: Strength - should be leveraged and maintained



Initiative Level



Release Level



Notes

Reflection: Applying the PCT Model to Improve Project Health



What have you learned that helps you **plan for your conditions**?



What have you learned that offers new **choices**?

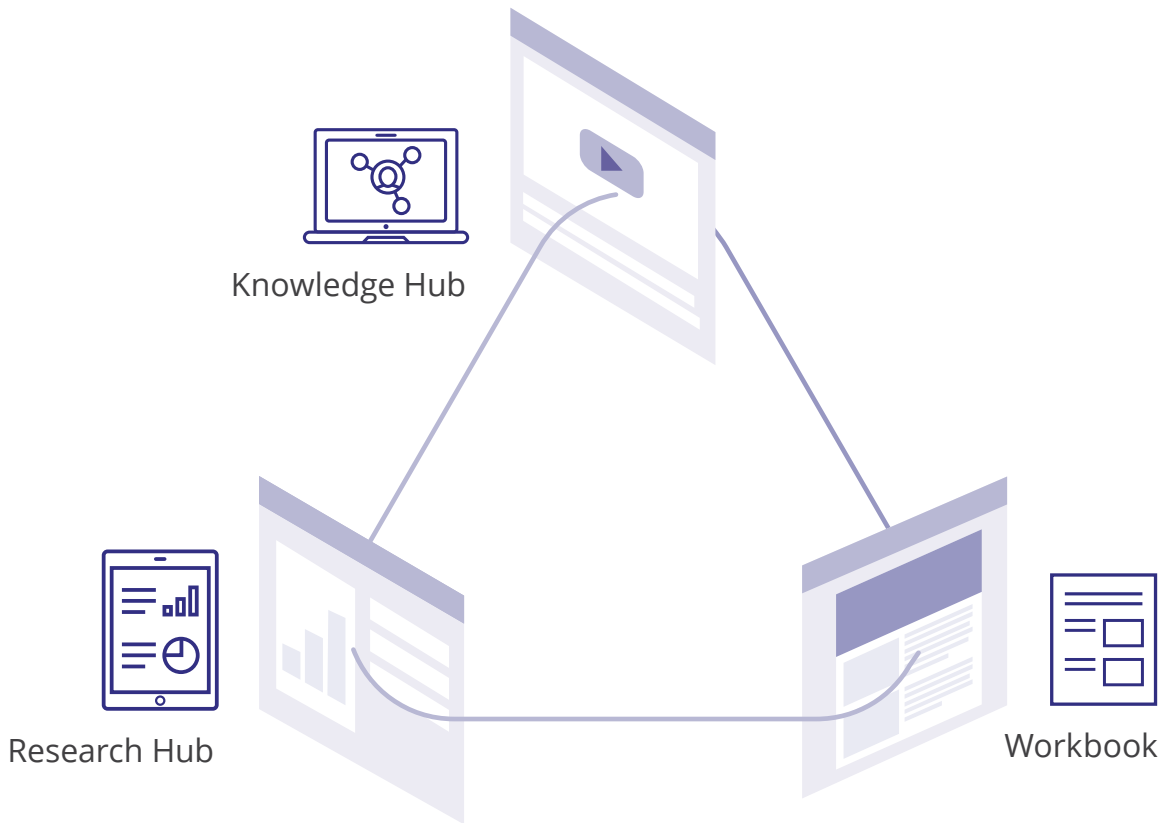


What have you learned that helps you **respond to the unexpected**?



What have you learned that confirms you are **on track**?

Recap Your Resources



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Grow Your Practice



What is one commitment you will make to effectively apply the PCT Model to improve project health?

Notes

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Applying the PCT Model



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