

# MID-PROJECT ASSESSMENT/AUDIT

HOW WELL IS YOUR CHANGE MANAGEMENT STRATEGY WORKING?

lamarsh and associates, inc.  
consulting services for changing organizations



## Reducing the risk to your project.....

Today, most solid project implementation plans are launched with the aid of a comprehensive Change Management Strategy and the appropriate Communications, Learning and Rewards/Recognition plans that will support the project implementation plan. Of course, as the transition occurs, the Current State of the organization will be changing during the project life cycle. During the course of a lengthy and complex change initiative, internal and external drivers that could not be anticipated during the planning phase are often introduced (competitive activities, market issues, acquisitions, reorganizations, promotions, regulatory mandates, union activities, etc.).

These drivers can also alter the Desired State, further introducing unforeseen resistance and risk to your implementation plan. Re-assessing your original Change Management Strategy and action plans in mid-project can either reinforce the validity of the original Change Management Strategy for the future or identify solid business reasons for adjusting the Change Management Strategy and its action plans to account for these unforeseen conditions/drivers and the potential new sources of resistance that may now exist in the new Current State.

The **Mid-Project Assessment/Audit** is designed to re-assess this potential for resistance in mid-project. LaMarsh & Associates will provide an independent “fresh pair of eyes” who will objectively evaluate your project plans in support of the Change Agents and project team. We will review the current situation and the history of the project to date from a change management perspective. We will look at how effective the Change Management Strategy has served the project to-date. We will provide a high level gap analysis of the new Current State relative to the original Current State at project launch and the project plan as it was deployed at launch. We will review the original Desired State and validate its currency for moving ahead. If necessary, we will recommend specific enhancements and adjustments to the Change Management Strategy and the action plans so that change management discipline can be sustained through the full lifecycle of the change initiative.

Reduce your risk! Make sure that the results and gains of the project become sustainable! Reduce the stress on the organization! Save money! Finish the project ahead of schedule! Reduce the “pain of the change” for everyone! Make your project a “Win” that everyone will remember and try to emulate.

## Objectives – to help the project team:

- Review the history of the project to-date (successes and failures) and what the organization currently believes.
- Review the Change Management Strategy and action plans for the project.
- Review other recent initiatives that could affect (positively or negatively) your project implementation plan.
- Identify new potential sources of organizational resistance from the perspective of the project team members.
- Identify new potential sources and degree of resistance within the changing organization(s).
- Assess the capabilities of the current change management resources and validate the methods/approach required to manage changes being implemented.
- Strengthen project viability by recommending modifications and adjustments to the Strategy and action plans.

## Results:

- For the Business Unit: Identifies hidden project risk that may arise if the un-anticipated natural resistance to the change is not effectively addressed.
- For the Project Team: Re-introduces or re-inforces the process, model and supporting tools for identifying and addressing resistance that will maximize the potential for the project team to be successful.
- For the Change Management Lead: Provides validation of his/her work and coaching and mentoring opportunities with the LaMarsh & Associates *Consultant*.
- For the Project Leadership: Provides the awareness of unanticipated or new issues that must be addressed going forward and the support for providing good sponsorship for the team and the Targets.
- General: Validates or adjusts the “road map” for managing the change for all to follow during the balance of the implementation by which the project team and the project leadership will turn organizational resistance into acceptance.



K. Judge

## MID-PROJECT ASSESSMENT/AUDIT OUTLINE

The LaMarsh & Associates Consultant, working with project team leadership and team members, will complete the Mid-Project Assessment/Audit to determine the degree of risk to the project from the organizational resistance that is and will be generated by the change.

- 1. Preparation:** Project orientation and preliminary data gathering to clarify the expectations, process, and logistics required to complete the Mid-Project Project Assessment/Audit.  
  
Activities will include:
  - Review original project business case, project methodology, roles & responsibilities, status reports, and deliverables to-date
  - Facilitate Kick-off Meeting with project leadership to clarify their expectations of the Mid-Project Assessment/Audit, provide information about the process, and illustrate an example of a Project Risk Analysis Report. Based on the results of this meeting, the scope of work may be altered, as required
  - Schedule interviews
  - Prepare customized interview questions, as needed
- 2. Interviews and Data Gathering:** Conduct interviews and/or surveys with selected project team resources and participate in key meetings.
- 3. Data Consolidation and Analysis:** Organize data and perform analysis on unique barriers, issues, trends, and patterns for degree of risk and prioritization. Option: Send interviewees a summary of the notes that were taken during their interview.
- 4. Development of Project Risk Analysis Report:** Integrate findings and recommendations into a report identifying the organizational change management issues and risks associated with the project and the project team.  
  
Report can include:
  - a. Executive Summary highlighting strengths and primary risks
  - b. Specific issues and findings
  - c. Other project specific reporting
  - d. Recommendations
- 5. Present Report:** Provide a report to key project leadership for discussion and feedback. Provide a change management action plan template to begin the process of deciding which recommendations to implement with tasks, owners, and timelines.

## MID-PROJECT ASSESSMENT/AUDIT LOGISTICS

The duration of Mid-Project Assessments/Audits vary with the scope and complexity of the particular project at hand. Factors that will determine the duration and costs of a Mid-Project Assessment/Audit are:

- The magnitude of the change (number of Targets affected)
- Complexity of the change (departments/Sponsors affected)
- The planned duration of the project (number of months)
- The type of project (ERP, Re-org, CRM, etc.)
- Number of locations to be visited

**Participants:** Project Managers, project teams, change agents, team members, selected project sponsors

**Prerequisites:** None. In order to complete a thorough Mid-Project Assessment/Audit, it may be necessary to hold several interviews with selected representatives. Therefore, the target dates and schedule are subject to availability of the key individuals and the urgency of the project deliverables.

**Timing:** Between 5 -15 days. The Scope of Work will be determined by the complexity and magnitude of the project as well as the number of objectives/requirements selected by the project management team.

**Location:** Client site and virtual

**Pricing:** \$ 17,600US - \$52,800US, plus Travel & Living Expenses for projects in the U.S. (contiguous 48 States) and Canada. Quotes are available for the Mid-Project Assessment/Audit service conducted at international venues.

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### WHO IS LAMARSH & ASSOCIATES?

*We are a world leader in change management consulting and learning services. We help our clients deliver the results and benefits expected from business change like that driven by technology or a merger/acquisition. Our goal is to help our clients reduce resistance and make it easier for their people to change. Through our commitment to knowledge transfer, we empower our clients to become their own internal change management resources.*

*Our services include cutting-edge web-based e-learning, a complete step-by-step consulting methodology, a multi-level competency development program, unparalleled project consulting and executive coaching. We invite you to join companies from around the world across a variety of industries and lines of business who already experience the value and power of the Managed Change™ approach.*