

Project Management in the time of COVID¹

Facilitating Change

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Dr. Lynda Bourne

At the time of writing (October 2022), Australian Governments, both Federal and State, have lifted most COVID restrictions. They are now pleading with potential immigrants, students and backpackers to return and help alleviate the widespread worker shortages. Local workers, already in work whether permanent or on contract, are reluctant to return full-time to the office. Some workers are still recovering from the anxiety of the two years of uncertainty or even job losses as employers took advantage of the lockdowns to alter the working conditions of their existing workers. Despite the fervent wishes of employers, workers do not intend or want to return to the previous normal work-life.

This is the final paper in the series: PM in the time of COVID. The objective of this paper is to proffer practical ways to implement the changes proposed in the previous four papers, and to identify processes and actions that can be applied by organizations to assist with the transition to life post-COVID. It is organized as follows: firstly, a discussion of the importance of leadership, engagement of stakeholders, managing uncertainty, and consultation and communication. The second part discusses approaches for effective change management. The third section will focus on how to identify and counteract recurring issues in implementing the change.

Essentials of successful change management

The context of any successful change and in particular the context of developing a ‘new normal’ after the disruptions to social and working life need to consider the essentials four parts of any social structure, and in this case the structure of organizations: managing through disruption and uncertainty, leadership, people and communication. Previous papers in this series reviewed how Australian social and working life was disrupted in the context of these four elements. The

¹ This series is by Dr. Lynda Bourne, author of the books *Stakeholder Relationship Management: A Maturity Model for Organisational Implementation* (2009), *Advising Upwards: A Framework for Understanding and Engaging Senior Management Stakeholders* (2011) and several others. She is a globally-recognized expert on project stakeholder engagement, risk management and other PM-related topics. For more, see her author profile at the end of this article.

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following section summarizes some of the points of those papers and then discusses how they are important elements for any successful organizational change³.

Uncertainty

The pandemic and its consequent restrictions reminded us that the future is always uncertain and that we are never mentally or materially prepared enough for risk events such as this one. It also illustrated the ebb and flow of anxiety that comes from facing uncertainty and harsh life events such as death, illness, loss of income, fire and flood. That is the ‘ebb’: the ‘flow’ happens when we adjust to the disruption, or we receive financial or other types of relief. In those circumstances most of us can adapt. There are still individuals who do not adapt or cannot adapt: instances of mental health issues in people of all ages have increased considerably since the start of the pandemic. The aftermath of the disruption and its consequent mental health issues must be considered as an important workplace issue for organizations to accept and deal with.

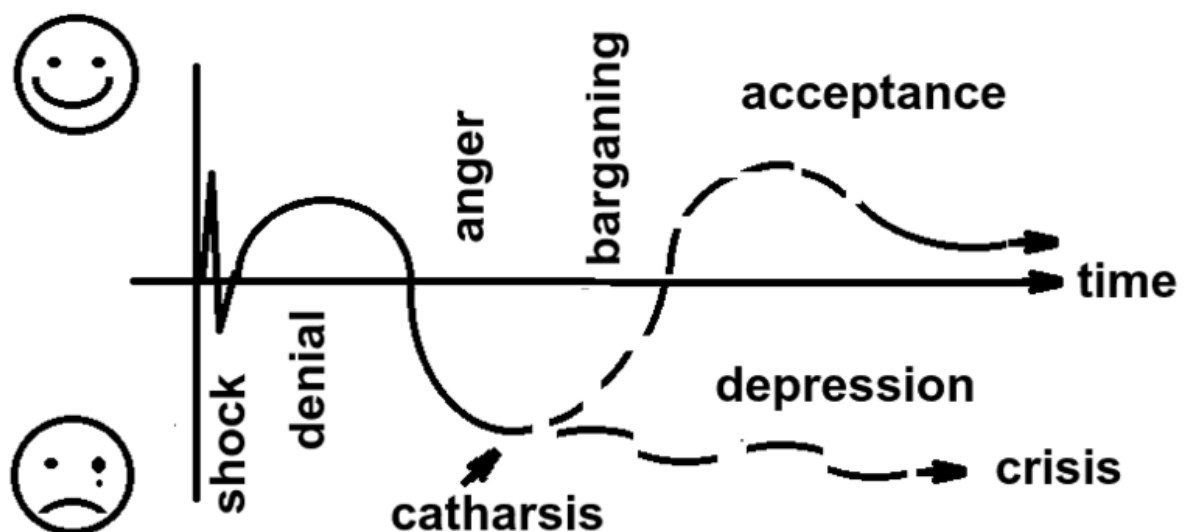


Figure 1: The journey through disruption and uncertainty (based on Kubler-Ross ‘Stages of Grief’)⁴

Figure 1 shows how exposure to grief, change or uncertainty may lead an individual through many emotions from shock and anger to acceptance in many cases but for others, continued negative

³ But beware: change is always disruptive – even positive change. The Kubler-Ross stages of grief summarise how it might go OR how it usually goes. The diagram (Stages of Grief) shows it all!! <https://speakinggrief.org/get-better-at-grief>.

⁴ Diagram showing two possible outcomes of grief or a life-changing event (introverted depression or extroverted life enhancing overall benefit). Available from Wikimedia Commons. November 2017

emotions. This figure was a useful illustration of how we experienced the pandemic and are still struggling to reach a new stage of acceptance.

Observations of people experiencing change in their work life, or their social life supports the diagram to a greater or lesser extent. Something quite small such as the rearrangement of chairs in a waiting room will cause regular users to comment and perhaps complain about having to become accustomed to the new arrangement. Before long, this new situation will be accepted without question. In an organizational setting, however, changes to office layout, new people joining a team, new IT systems or restructurings are received with varying degrees of consternation and comment and mostly final acceptance.

In the case of a major change to the structure and working arrangements of an organization, the leaders of the change need to deliver a complex campaign of multiple messages over the entire period of the change program. The messages should contain information about the reasons for the change, how each individual may be affected by the change, and what the new structure will look like. These messages must be directed to every part of the organization using language and content that is appropriate to each level within the organization. A rule of thumb is that important messages need to be delivered three times to be effective – not necessarily repetition; more re-iteration. These communication efforts and wide consultation and encouragement of feedback and contributions may not ensure trouble-free change but will certainly reduce the impact of the changes.

More details of communication techniques will be discussed in the section on communication.

Leadership

Governments, employers and community leaders did not respond immediately once the virus reached our shores – they did not really know how to respond. Organizations and governments are run by people who were also affected negatively by the forces of the pandemic on our lives, and so they were affected just as much as the rest of the population. They had to make executive decisions while at the same time dealing with their own fears and anxiety and that of their families.

The public's cooperation with the severe restrictions in the early days rapidly deteriorated as time and successive lockdowns followed. Initially leaders' reactions demonstrated that the focus was on protecting the health of the public. Over time, however, economic forces influenced a move to re-open the economy and protect businesses. In building the 'new normal' the expected obligations of leadership need to be supplemented with new requirements – of kindness and consideration. A new focus for leadership must recognize that workers are people with families and lives, many of them did not prosper during lockdown. New leadership must recognize, for example, the many benefits of more flexible hours for their workers and how this flexibility will benefit the organization as well.

Leaders of a change program are expected to hold many roles and to display many characteristics. These characteristics may include:

- Recognizing the need for change
- Creating the Vision to inspire enthusiasm for or at the very least compliance to the achievement of the objectives
- Forming teams of individuals at all levels of the organization
- Inspiring those affected by the change
- Negotiating agreements
- Delegation
- Long-term thinking
- Continuous consultation throughout the change program.

The leadership team must be involved in all parts of the change program, but not take command.

People

The stakeholders of the organization have all been affected by the events of the last two years; Some workplace conflicts never change – workers need flexibility, they need to feel that they have some control over both working lives and social lives. Pre-pandemic many knowledge workers being forced to be ‘always on’ – working long hours and expected to respond to emails even in their leisure hours. Now they are aware that there are other ways to be productive and pursue work/life balance.

Reports of workers reluctance to return to full-time attendance at the office are matched by stories of employers who do not believe that workers will be productive enough if they are not supervised in person. Organizational executives are concerned about productivity and wasted resources of office space remaining unused. On the other hand, workers are prepared to change employers in the search for more flexibility and better working conditions.

Developing good compromises will require extensive negotiation and consultation; any changes to working conditions will also require changes to conditions of employment and any other legal requirements attached to workplace and workforce.

There will be additional changes to how work is done, and the tools provided to support that work, designed to help an organization survive or to readjust to competitive reality in the ‘new normal’.

In any organizational activity the people, stakeholders, are the main source of risk, and determine the success or failure of that activity. This is the reason for the time and effort spent on communication, consultation, reporting and review and finally celebration of success. Without the involvement of all the people the objectives of the change may not be achieved. Referring again

to Figure 1, at any step in those stages of grief, the people may be more focused on their emotional responses to the change to actually be able to participate – these emotional responses will have a negative effect on achievement of the goals and objectives of the change

Communication

As Governments and the medical profession learnt more about the virus and how to contain it, there was more pressure to ensure that all parts of society were kept informed; this was a major challenge. People needed information about how to protect themselves and others and the conditions and restrictions that Governments had imposed on the population. Information was necessary for everyone from different backgrounds to understand why restrictions and vaccinations were necessary and to provide updates on the ever-changing conditions. At first the information transmission was too general; it failed to reach many sectors. As the pandemic progressed, communication was adapted to access some of the previous hard-to-reach groups, such as older migrants whose grasp of English was tenuous. Communication channels became more granular, often using existing support groups as the conduit for information and in the other direction, for feedback to the authorities. Younger cohorts who did not use traditional means of information dissemination and mainly received their information from social media were another hard-to-reach group. Social media sources were not always sources of legitimate information with peddlers of paranoia joining in the activity, thus causing confusion and disarray in society.

Much has been written about communication to niche groups and the dangers of using social media as the principal means of information acquisition; some lessons have been learned both from the legitimate disseminators but also from the receivers who may have developed means to test the ‘fakeness’ of the information.

Clear and concise data from reputable sources such as the organization’s leadership is vital for success. But it is essential to remember that communication of any sort must never be ‘one size fits all’. The messages need to be concise and targeted. Targeted communication requires consideration of⁵:

- Culture of the individual or group – national, generational, professional, gender
- Purpose of the message – for action, for information
- For face-to-face messages, tone of voice, word choice, gestures
- Frequency
- Level of detail

Understanding how people may react to the challenges of change can help build a path through the intricacies of messaging outlined above. Helping people to navigate the complexities of the changes and changing long-standing work habits may require the change makers to understand

⁵ Bourne, L (2012). *Making Projects Work*. Has detailed descriptions of the aspects of successful communication

what drives and inspires people – what causes them to feel threatened or what has the potential for reward. SCARF⁶ is a tool for honing communication messages and for understanding the state of the change from the perspective of those people who feel most threatened by the change and may be reluctant or resistant to any involvement in that change. Applying the SCARF model to people who are important to the program, but are resistant, may aid in understanding their positions and reducing resistance through modification of the structure and content of the messages.

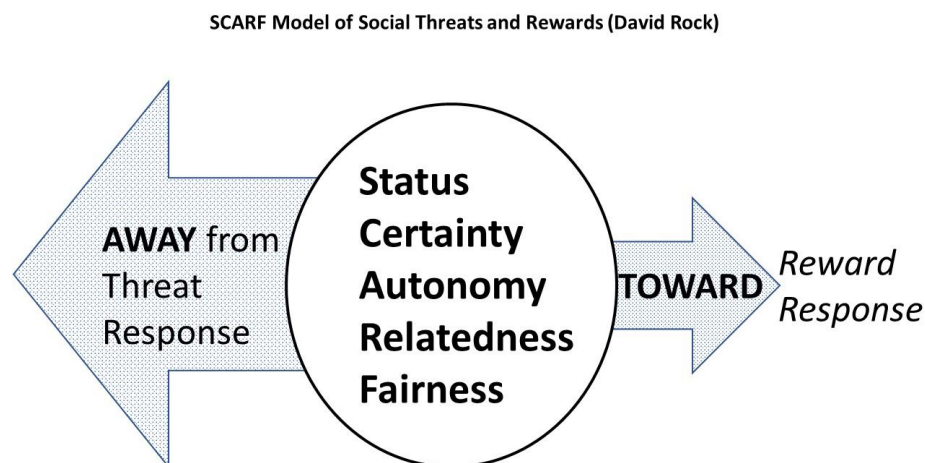


Figure 2: SCARF Model⁷

The elements of SCARF are:

- **Status:** how a person perceives her position relative to others in a community such as work. It can include job title, recognition within the community, an office. It is generally considered more important than socioeconomic status. Any potential change may cause a person to believe that it will affect perceived status.
- **Certainty:** we all need clarity and predictability and ignore the fact that things can change and the unexpected may occur without notice. The larger or wider the change the greater the uncertainty and the more important consultation and clear goals and plans will be.
- **Autonomy:** need to feel that we have some control over life and work. It is important that people who feel vulnerable to the outcomes of the change have the opportunity to participate in both decisions that affect them and the implementation of those aspects of the change that may affect them.

⁶ <https://www.youtube.com/watch?v=5Wu33SdjeCs>: David Rock explains the SCARF concept

⁷ Adapted from: <https://www.edbatista.com/2010/03/scarf.html>

- **Relatedness:** we need to belong to social groups. Working groups must be formed to plan implement and review all aspects of the change; these groups must consist of a wide cross-section of the organization to be most effective.
- **Fairness:** we need to feel that we are being treated equitably. People who feel that they are being treated unfairly will become demotivated, defensive and resistant. It is essential to develop clear rules, communicate frequently and ensure that the reasons for all decisions are clear.

If the influence of a resistant individual is essential to the program an analysis of responses in any of these five areas can facilitate discussions and assurance to reduce resistance and, in many cases, foster enthusiastic support for the change.

Implementing the change

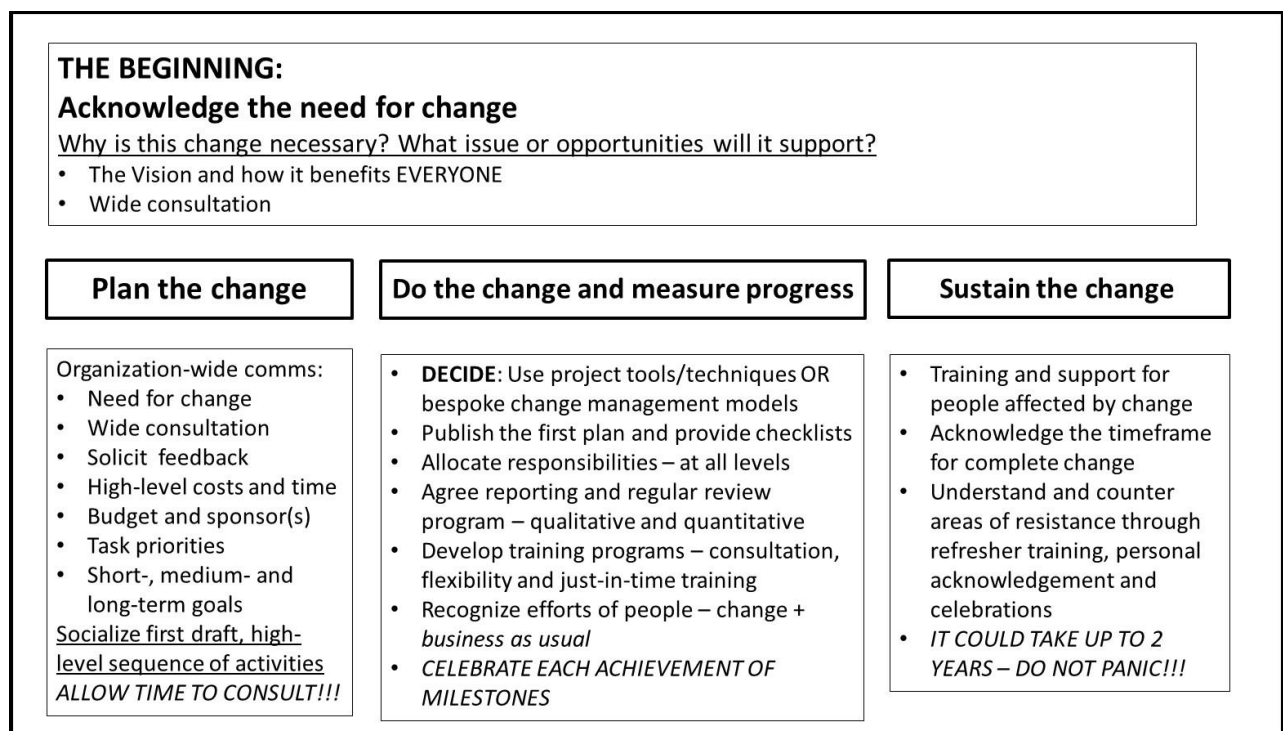


Figure 3: Overview of essential change actions

Figure 3 outlines the four clear parts of any change program:

- Beginning – define the need for change and communicate the Vision.
- Developing the Plan
- Implementing the change
- Sustaining the change.

Introducing change is complicated; people are reluctant to change their habitual way of working or travelling (or doing anything). Consequently, those most affected by the change need to feel that they have some involvement in the decisions and outcomes of the change process. Change models and methodologies abound. In this paper I have chosen not to select any one model, but identified the (hybrid) process I have found to be most effective in organizational change management.

1. The Beginning: developing Vision, strategies and communication

Acknowledge the need for change

Many members of the organization will not really be concerned about the ‘bottom line’ of the organization. Their only concern is keeping their job and being paid for what they do. The bottom line is the responsibility of management, and only they are accountable for the continued successful operations of the organization. So any announcements from management about the need for change will initially be greeted with anxiety – *will I lose my job?* The anxiety about change post-pandemic will be even sharper coming on top of the issues with family, income and work during lockdowns.

Announcements about impending change may be perceived as disaster. Communication from management therefore needs to provide information about why this change is necessary. The first messages need to include clear and understandable information about the issue that the change will remedy. The high-level information from the CEO must be supported by a cascade of information for each level of the organization delivered by that level’s management with opportunities for questions and feedback.

Any initial Vision developed by the executive must include how all areas of the organization will be affected and how they will benefit. It is always useful to include what the end-product will look like.

The organization-wide consultation resulting from the first stage of sharing the reasons and vision of the change must be seen to be received back in the executive levels and in some cases how it will modify the first pass.

2. Plan the change

The first decision must be about whether the change requires a revolutionary approach (organizational re-engineering or transformation) OR an evolutionary approach based on modification of the structures and processes supporting the organization’s activities. Generally, an evolutionary approach that does not introduce change too quickly is preferable – as long as it doesn’t drag the whole program out for too long. The best schedule incorporates improvements in

effectiveness and efficiency but also allows ‘business as usual’ operational activities to continue during the planned changes. The purpose of the plan is to ready the organization for change and beginning the process of breaking habitual ways of doing and thinking – ‘unlearning’.

The second decision is how to prepare the plan for implementation. In my experience, use of Project Management tools and techniques works best – it supports flexibility and enables modelling the unique features and cultures of the organization.

Organization-wide communications and consultation re-enforces previous messages about the need for change and continues to encourage feedback and involvement is important. Also important is gathering of data to develop the plan that should contain:

- High-level costs and time
- Budget and sponsor(s)
- Task priorities
- Risks
- Short-, medium- and long-term goals

Again, it is important to socialize this first draft, high-level sequence of activities, for improvement, for reduction of resistance and to ensure that all people involved feel that they have some control over decision about the work they will be expected to do.

ALLOW TIME TO CONSULT!!!

Deciding the Sequence, Timing and Priority

Force-field analysis or similar models⁸ provides a guide to assist organizations understand the ‘forces for’ and the ‘forces against’ the proposed change – its planning and its implementation. The identification of threats and opportunities will assist in risk management, but also assist in identification of priorities and appropriate sequencing to ensure a regular delivery of milestones in the form of short-term, medium-term and long-term deliverables. Such a sequence will keep the work front of mind, but also ensure through celebration of even the smallest achievements assists in maintaining the appropriate momentum and avoids the often-inevitable increase in resistance and decrease in enthusiasm.

Force-field analysis is useful for establishing a ‘current state’ as a baseline developing, communicating the strategy and plan for the change, and allows flexibility to support the suggestions and resistances of the workers. Once some agreement and stability has been reached the ‘end state’ can also be identified including the prioritized delivery timeline and milestones and achievement of objectives and goals. Forces for change will be identified (opportunities to learn

⁸ Other tools include SWOT analysis (strengths, weaknesses, opportunities and threats), risk analysis models that also includes opportunities, Ishikawa’s *fishbone* diagram.

new skills, improvements to ensure continued existence of the organization, recognition of the benefits of consulting all stakeholders) – forces against (having to learn new roles, hating the disruption of the change, resistance to change, inadequate skills and resources to implement the change adequately, confusion about the reasons for the change).

These forces should be reviewed and perhaps modified throughout the change program and assists with risk management but is also a strong communication tool to ensure that everyone involved in the change at all levels of the organization is clear about what is happening and how the organization is moving to achieve the initial objectives.

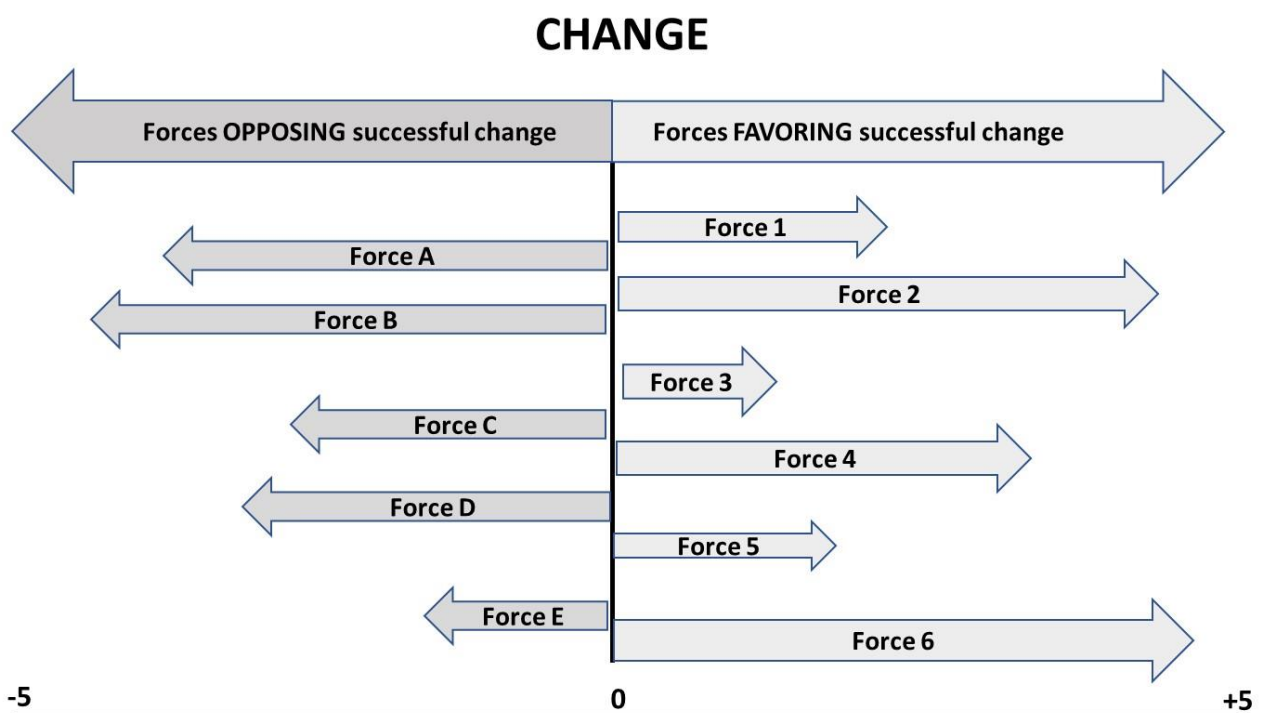


Figure 4: An example of force-field analysis⁹

Supporting Tools and Templates

Every change is unique and while strategies, tools and techniques can be defined either as a project or as a specialist change program using accepted models. Many existing models or tools can support successful change at different parts of the program. For example, the ADKAR model can support planning, implementation and sustaining and outcomes through templates and more detailed instructions on what needs to be done and what the output of these activities should look like.

⁹ Based on: <https://www.sciencedirect.com/topics/computer-science/force-field-analysis>

There are five separate activities:

- **A: Awareness** of the need for change: ensuring that everyone understands why this change is important.
- **D: Desire** to support and participate in the change: through consultation and information gain support for the work.
- **K: Knowledge** of how to change: training to support the work of change.
- **A: Ability** to implement required skills and behaviours: training for participants for the new roles and processes themselves.
- **R: Reinforcement** to sustain the change: ensuring the change ‘sticks’.

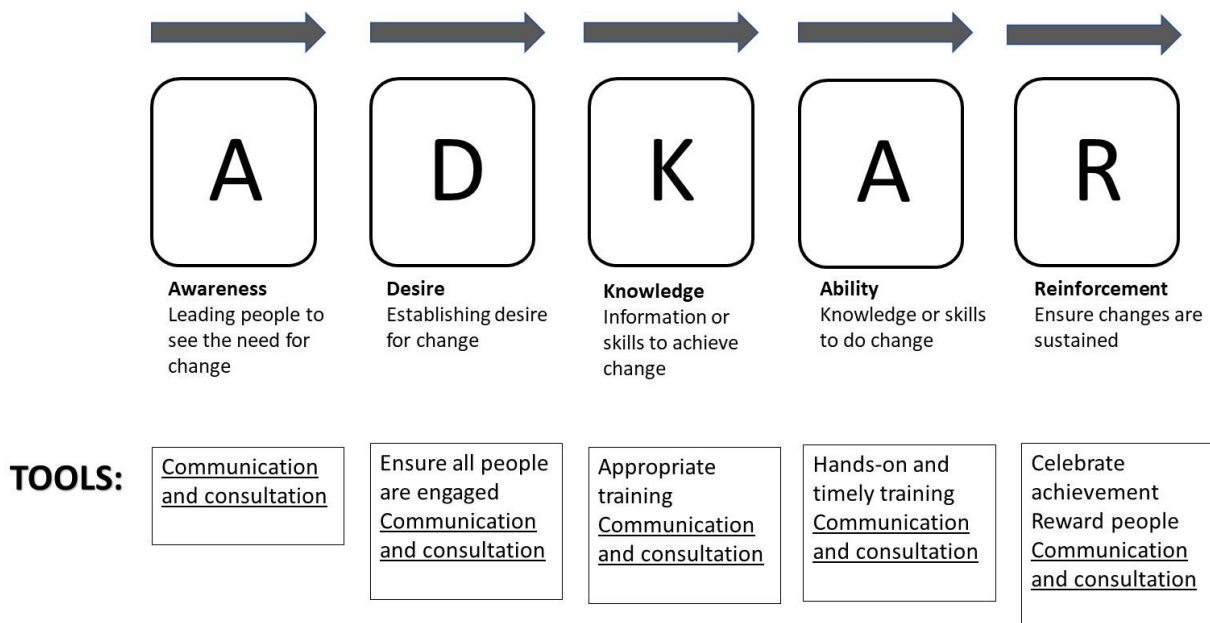


Figure 5: Summary of the features of ADKAR¹⁰

There are very useful templates and instructions to assist the processes of the change program. The ADKAR model may be the essential detail for successful change because it incorporates all aspects of successful change management.

When the plan is agreed the first steps are begin the work of changing process, tools and procedures according to the plan. The first stages are listed below:

- **DECIDE:** Use project tools/techniques OR bespoke change management models
- Publish the first plan and provide checklists
- Allocate responsibilities – at all levels

¹⁰ Summary of the features of the ADKAR model. Adapted from: <https://www.nexum.eu/article/practicing-adkarr-model-turning-methodology-real-life-success>

3. Do the change and measure progress

Training programs that have not already been addressed and developed must be set in place early in this stage.

As work defined in the plan, completed tasks will be recorded and reported, according to the agreed reporting and review program. The reports should contain both qualitative and quantitative information and in formats directed to the information needs of the recipients.

It is also essential to establish a regular review program, where progress is reviewed, schedule is modified where necessary, risks considered and managed where appropriate. As part of the review success must be celebrated and the efforts of people in both the change program and in the operation (business as usual) areas are acknowledged.

Within the overall strategy, the sequence of activities has been developed and socialized. Longer term steps are high-level, closer actions are more detailed, but there must always be room for flexibility – to be able to change priority, change sequence change deliverables in response to real-time events or feedback from those workers involved or directly affected by the actions of implementation. Every plan and schedule will be unique to the organization, its current and future situations and the inputs of stakeholders.

It will be useful however to have some checklists about what needs to be included and perhaps how to achieve the activities that have been identified and agreed.

4. Sustain the change

As key goals are completed and successes are celebrated, refresher courses may become necessary for the users of the new processes, tools and roles to ensure the outcomes and objectives of the change will ‘stick’. Refresher training may also assist in re-igniting enthusiasm and interest in the new state, particularly if the implementation phase has taken some time.

The usual project (or phase) closing activities are important:

- Review of the implementation to ensure no gaps in the implementation
- Review sessions to provide feedback and suggestions for continuous improvement
- Celebration of successes and recognition of the participants.

Measuring success

An essential part of the final review is measurement of the success of the change outcomes but also final data to support celebrations of success but also to provide an archive of what has been

learned throughout the process of the change program. These measures should be both quantitative and qualitative.

One quantitative measure that may be useful is DICE:

- **D: Duration** of time between reviews. Regular and frequent reviews of progress are essential to success of the change.
- **I: Integrity** – ability to complete initiative on time (members’ skills and interdependence). Depends on clear definition of roles and responsibilities and of ensuring that these roles are represented in all levels of the organization.
- **C: Commitment** of management and teams. Management must be consistent in support of the change. Practical involvement in the form of regular attendance at reviews and commitment to deal with issues in short time
- **E - Effort** – additional to regular work. Important to ensure all staff understand that change work is additional to business as usual. Important also to regularly acknowledge this additional commitment to time and effort to support change.

DICE mainly emphasises the ‘hard’ aspects of change and will be a useful tool for the regular or milestone reviews programmed into the implementation plan. However, to ensure ongoing success of the whole program it is also important to review the people-focused parts of the program.



Figure 6: Hope and reality¹¹

¹¹ <https://speakinggrief.org/get-better-at-grief>

Qualitative measures of success of the transition can take the form of:

- Measures of changes to schedule and timeframe and the consequent adjustments
- Surveys of those involved in the change program. If surveys are to be used to measure success however, it is essential to firstly conduct surveys seeking information on the *expectations* of all those who will be involved. The expectations information provides a baseline to measure all later information sets.

The results of any or all of these reviews may be surprising.

Figure 6 illustrates the reality of many change programs. The disarray shown may be modified with frequent and regular communication and consultation.

Identifying and counteracting recurring threats to successful change

Based on the Kubler-Ross Stages of grief, Wikipedia has some assistance in overcoming some of the most common threats to successful change.¹²

- **Denial** - A common initial response to bad news exhibiting the hope that there is a mistake, or that this news or situation will not affect them.
- **Anger** – The recognition that there is no mistake is accompanied by anger and fear. Anger and fear¹³ - *Will I lose my Job? Will I have to learn new systems?* Often there are feelings of lack of fairness and loss of status and relatedness because organizational change is often accompanied by changes in accommodation.
- **Bargaining** – In the context of organizational change individuals do not really have access to bargaining but may resort to compliance with the work involved in preparing for the change.
- **Depression** – As the change becomes more concrete and some of the individual's worst fears seem to be being realized, she may resort to resistance – either outspoken or passive. This stage may also result in lost time through sickness and lack of focus on day-to-day tasks as well as any tasks in the change program
- **Acceptance** – The program is being implemented; it is hard to escape the reality of the outcomes of the work that is being done. With organizational change programs there may not be a new role for the individual, or the new processes may be new and exciting.

¹² https://en.wikipedia.org/wiki/Five_stages_of_grief

¹³ These are some of the reactions described earlier in discussions of the SCARF model.

Throughout all these stages, the organization must provide sufficient and appropriate information to ensure that the individual knows what is happening and what is happening to them. The organization should also ensure that unhappy individuals has access to counselling.

Conclusion

In the 21st Century organizations are no stranger to change. The disruption of constantly changing technology and shifting stage of global competition has meant that the organization and the people within it have to constantly adapt. In the 2020s a new disruption – the global pandemic COVID – affected every part of global society. In Australia as in everywhere else, we were all affected. Knowledge workers retreated to their homes to work, often within the chaos of other members of their families at home and competing for space, computers and attention. All organizations from small businesses to the corporate world had to adjust, some did not make it and others were able to endure while a few online traders made extraordinary profits.

When restrictions were lifted, the world of work faced many challenges. The foremost of these challenges was the overwhelming demand for flexible working conditions. In the social environment people now have a different view to ‘in-person’. How we purchase goods, how we travel, how we seek entertainment has not gone back to pre-pandemic conditions.

On many fronts, therefore, organizations face the requirement to change. While the elements that need to be changed are novel, organizational change programs are not. Any organization seeking to change will still face the challenges that previous organizations seeking to change have faced.

This paper seeks to build on previous papers in this series that examined four different aspects of both the pandemic disruption and the means to develop new ways of working through a change program. These four areas were uncertainty, leadership, people and communication.

The first part of the paper identified the importance of each of these areas in assisting organizations succeed in building the ‘new’ workforce and workplace.

The second part proposed a change program – also with four parts:

- Preparing the organization for the change,
- Planning the change,
- Implementing the change
- Sustaining the change.

The options proposed are based on my experiences in organizations implementing new IT systems over 15 years or so. The essence of what I learned about successful organizational change is:

- People are the key to success or the risk. Communicate early and often
- Provide a means for the people to communicate with those leading the change. The feedback may be valuable, but the most important aspect is allow people to be heard. This gives them autonomy and can reduce resistance
- The overall objectives may be fixed, but adaptability, flexibility and agility are essential for successful completion of the change program and achievement of the organization's objectives.

What has always worked in successful change programs that I have been involved in:

- Consultation – early and often to the end of the program.
- Communication – multiple messages, multiple sources, multiple media
- Multiple goals – short term, medium term, longer term
- Continual review of progress, plans and objectives
- Celebrate all successes

About the Author



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Lynda Bourne DPM, FACS is a senior management consultant, professional speaker, teacher and an award-winning project manager with 50 years professional industry experience. She has been focussed on the delivery of stakeholder management and other project related consultancy, mentoring and training for clients world-wide.

She has presented at conferences and seminars in South America, Europe, Russia, Asia, New Zealand and Australia to audiences of industry leaders and project managers in the IT, construction, defence and mining industries and has been keynote speaker at meetings and workshops within organisations in the finance and utilities sector.

In 2010 she was engaged as visiting professor at EAN University, Bogota, Colombia, teaching leadership in the Masters of PM Program for five years.

Most recently she was a member of the Faculty of Information Technology, Monash University, lecturing in IT management subjects, in particular, stakeholder management, communication and leadership.

Lynda Bourne has authored the following books:

- *Stakeholder Relationship Management: A Maturity Model for Organisational Implementation*, (Gower Publishing Ltd, Aldershot - 2009)
- *Project Relationship Management and the Stakeholder Circle: A guide for developing stakeholder management maturity in organisations* (2010)
- *Advising Upwards: A Framework for Understanding and Engaging Senior Management Stakeholders*, (Gower Publishing Ltd, Aldershot - 2011)
- *Making projects and programs work: What really matters for achieving successful project and program outcomes* (2015)

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