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Prosci® Webinars

## The PCT Model: Tracking Project Health

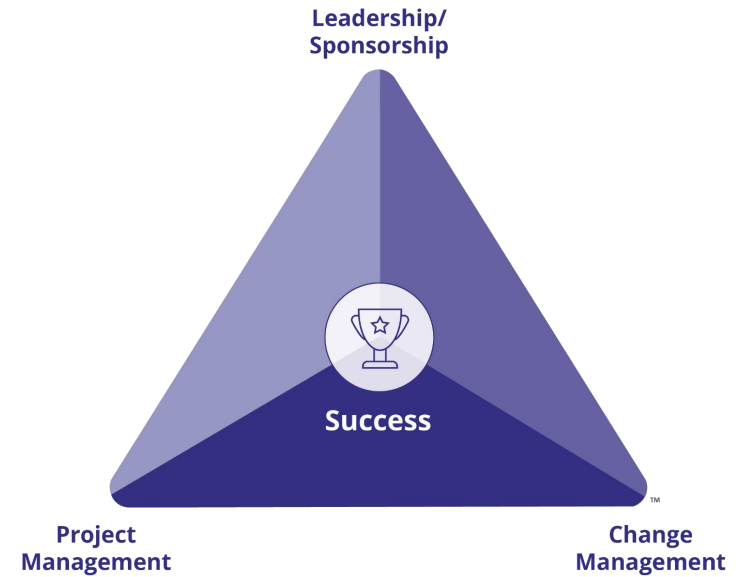
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## Agenda

# The PCT Model: Tracking Project Health



## PCT Model

PCT Assessment

PCT Application



# Have you previously attended Prosci Change Management training?

Yes, as an Experienced Practitioner

Yes, as a Practitioner

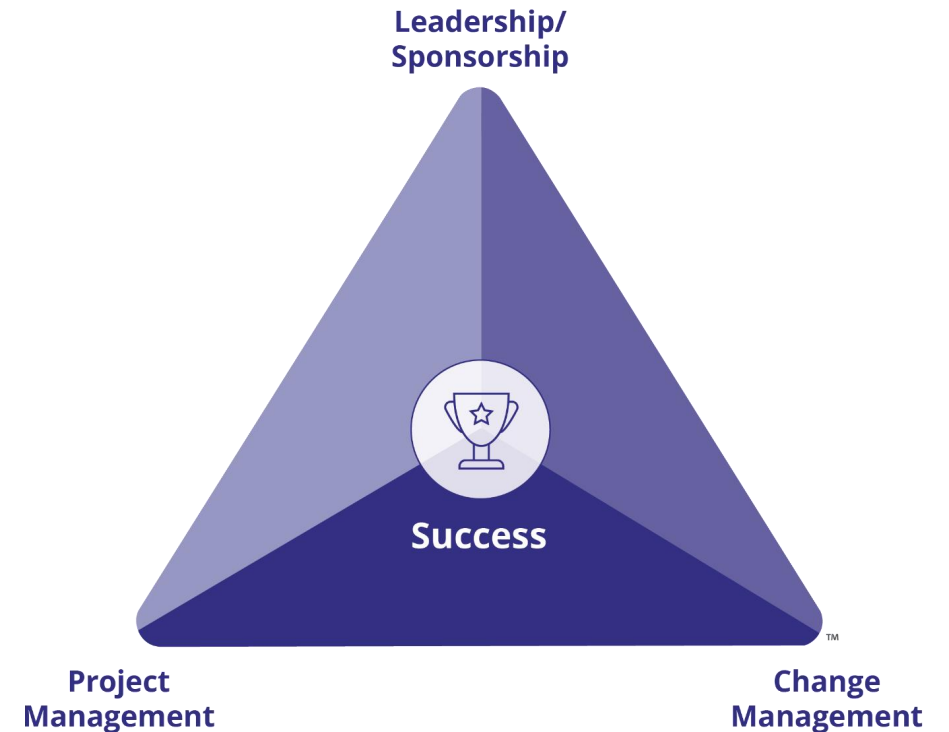
Yes, on a one day workshop

Only on the webinars

This is my first experience of Prosci

# Prosci Project Change Triangle (PCT) Model

- Created in 2006
- Based on client interactions
- A framework that describes the required elements needed for initiatives to be successful
- Projects are at risk if any of the four elements is missing
- A unified value proposition for delivering successful outcome and benefit realization



Prosci Change Triangle  
(PCT) Model



“Those who trust to chance  
must abide by the results of chance.”

*Calvin Coolidge*

*30th president of the United States  
1923 to 1929*



Looking Back  
July 13, 2006

WayBackMachine

Introducing the  
Prosci Change  
Triangle

INTERNET ARCHIVE  
WayBackMachine  
21 captures  
27 Aug 2006 - 14 Aug 2016  
JUL JUL OCT  
2005 13 2006 2007  
About this capture

Welcome to the Change Management Tutorial Series

Change Management Learning Center

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## Prosci Change Triangle

### Introduction

Why do some change initiatives fail while others succeed? The answer is not as complex as you might think. Prosci's research with organizations from public and private sectors reveals that the secret behind successful transformations can be distilled into a simple yet powerful model described by the *Prosci Change Triangle*. This tutorial series presents this model and will help you assess if you have the necessary ingredients for success.

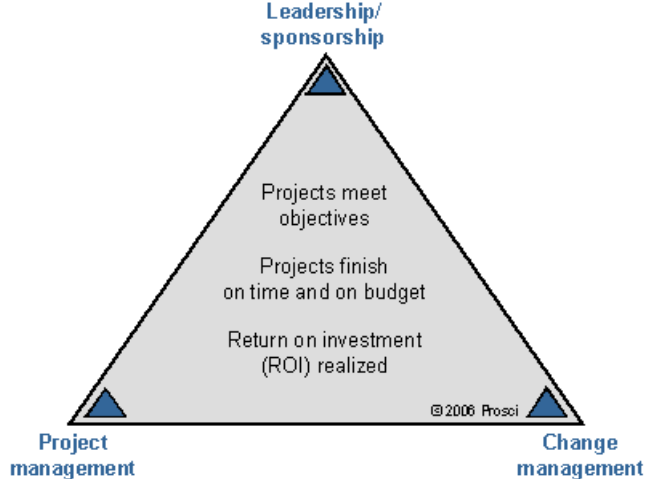
### The model

Think of the *Prosci Change Triangle* as a three-legged stool. The first leg is **executive leadership**. This leg represents the formulation of the strategy and direction for an organization, and the required leadership to set the necessary changes into motion.

The second leg is **project management**. This leg represents the fundamentals of managing a project, including the design of work tasks and the management of resources to implement a change on time and on budget.

The final leg is **change management** – the people side of the change. This leg represents the actions taken by the organization to help employees transition from the current state to the desired future state.

Figure 1 shows these three essential elements for realizing effective change.



The diagram is a triangle with three vertices. The top vertex is labeled "Leadership/ sponsorship". The bottom-left vertex is labeled "Project management". The bottom-right vertex is labeled "Change management". Inside the triangle, the text reads: "Projects meet objectives", "Projects finish on time and on budget", and "Return on investment (ROI) realized". A small copyright notice "© 2006 Prosci" is located at the bottom right of the triangle.

Prosci Change Triangle

# When did you first discover the PCT Model?

On today's webinar

2020-2021

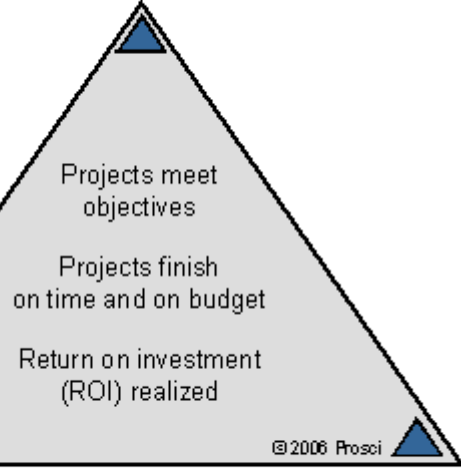
2015-2019

2010-2014

2006-2009

# Evolution of the PCT Model

Leadership/  
sponsorship

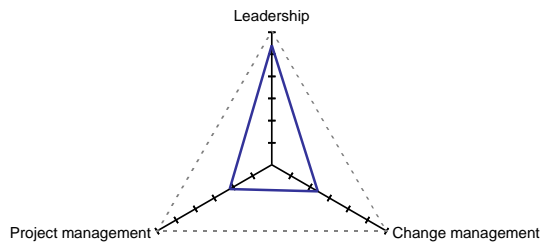


Project  
management

Change  
management

**Prosci Change Triangle**

*Prosci Change Triangle*



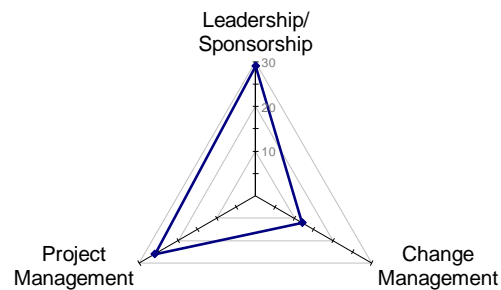
Leadership/  
Sponsorship



Project  
Management

Change  
Management

Prosci PCT Profile



The Prosci PCT Model is a trademark of Prosci.

Leadership/  
Sponsorship



Project  
Management

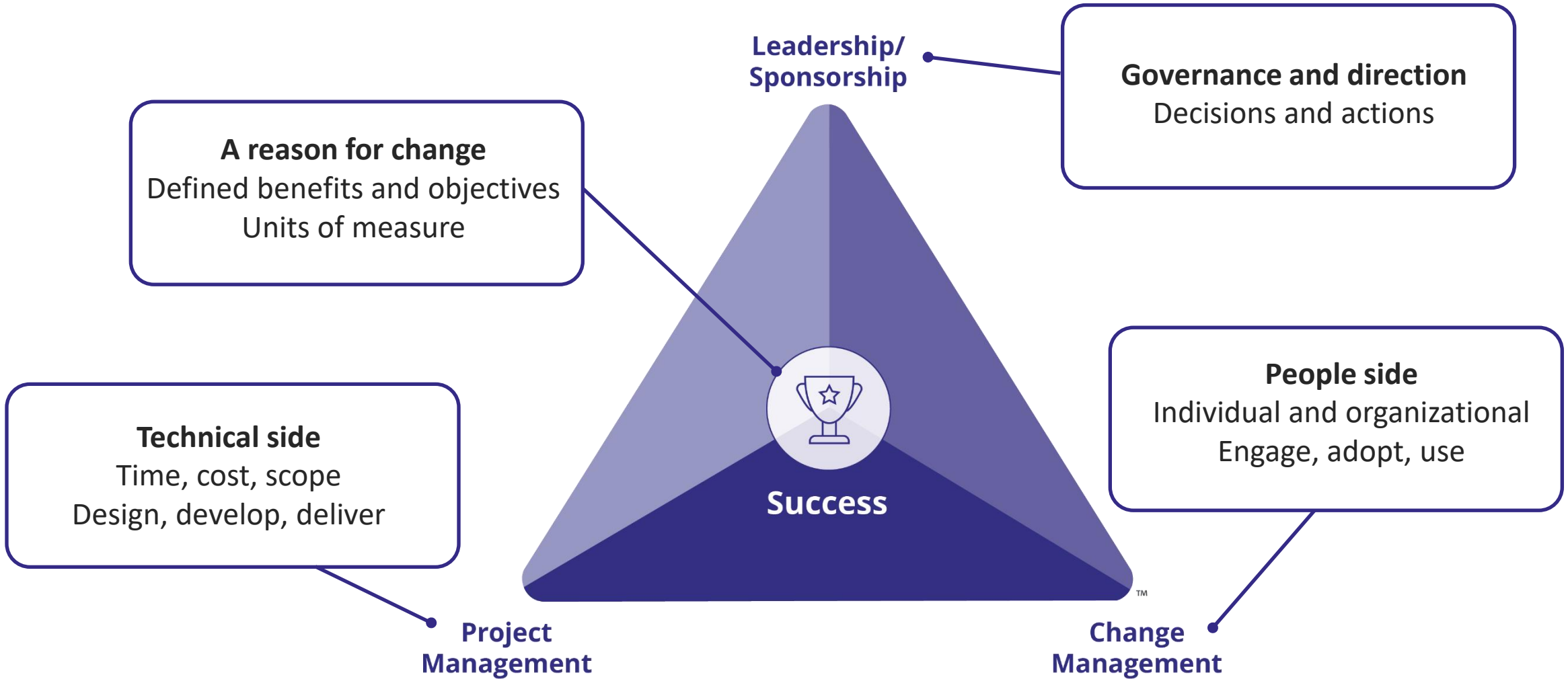
Change  
Management

Success





# Prosci Change Triangle (PCT) Model

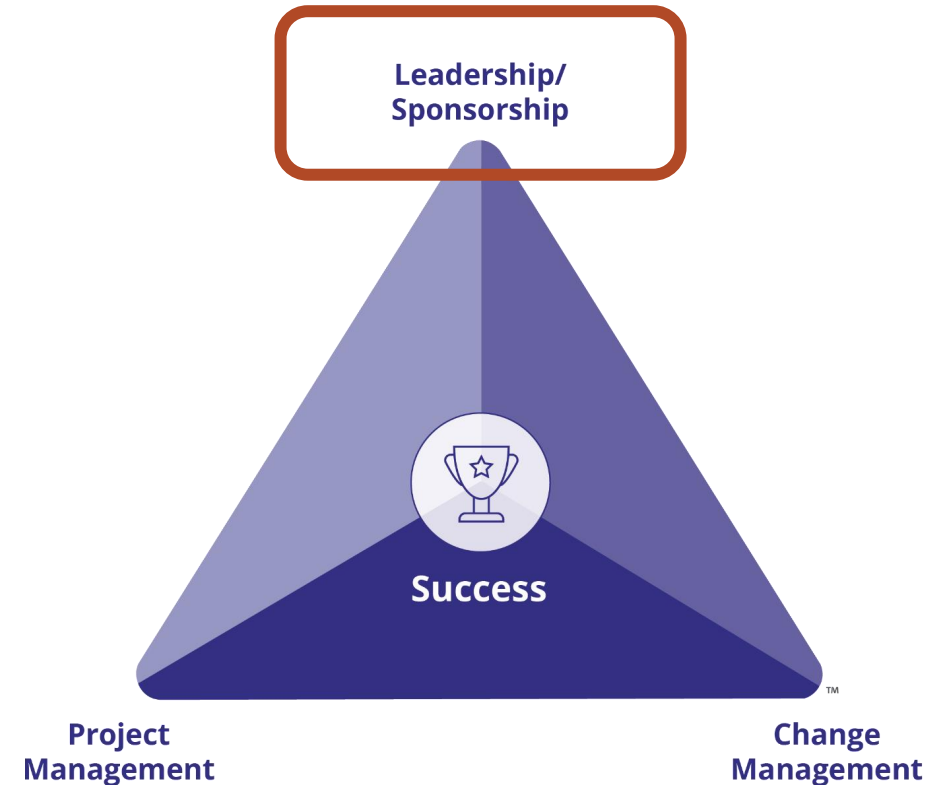


Prosci Change Triangle (PCT) Model

# Leadership/Sponsorship

- Governance and direction
- Commitment and authority
- Project and organization
- Decisions and actions

“Deciding where to go  
and how to get there”



Prosci Change Triangle  
(PCT) Model



# Words to describe the impact when we are missing Leadership/Sponsorship

# Project Management

- Technical side
- Change definition
- Time, cost, scope
- Tasks, resources, budget
- Defined deliverables

“Designing the solution  
to get there.”



Prosci Change Triangle  
(PCT) Model



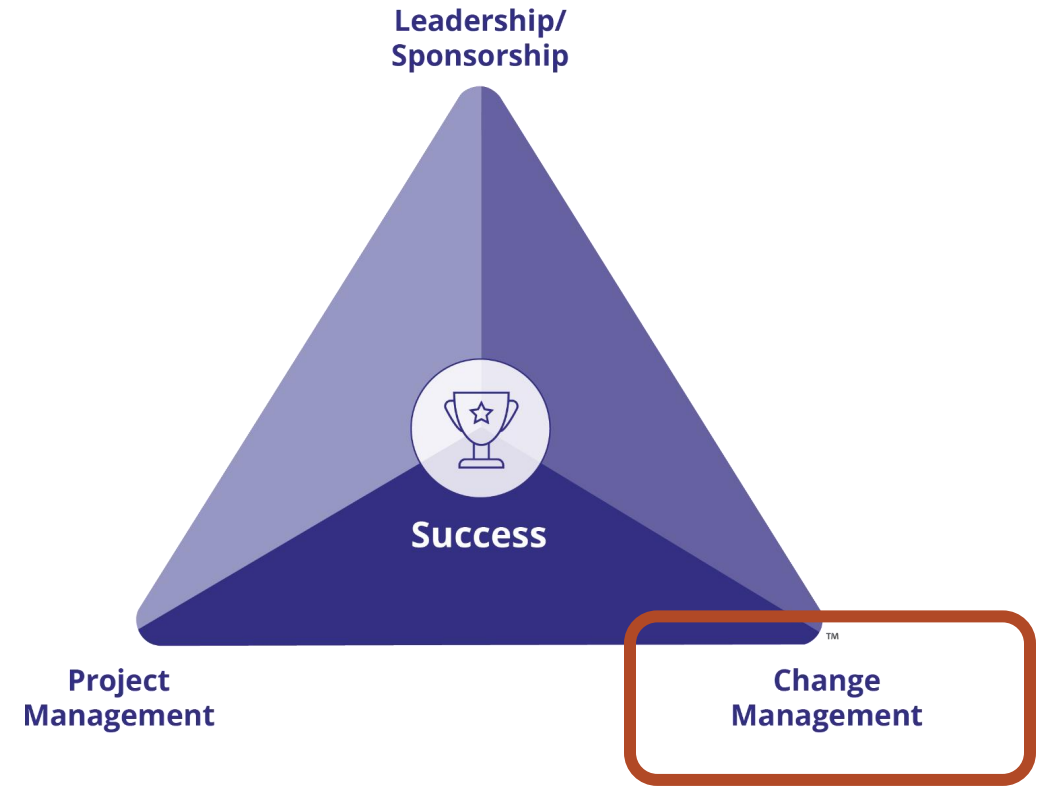
# Words to describe the impact when we are missing Project Management



# Change Management

- People side
- Bridge implementation and realization
- Individual and organizational
- Current to future state
- Process and tools

“Ensuring our people get there, too.”



Prosci Change Triangle  
(PCT) Model

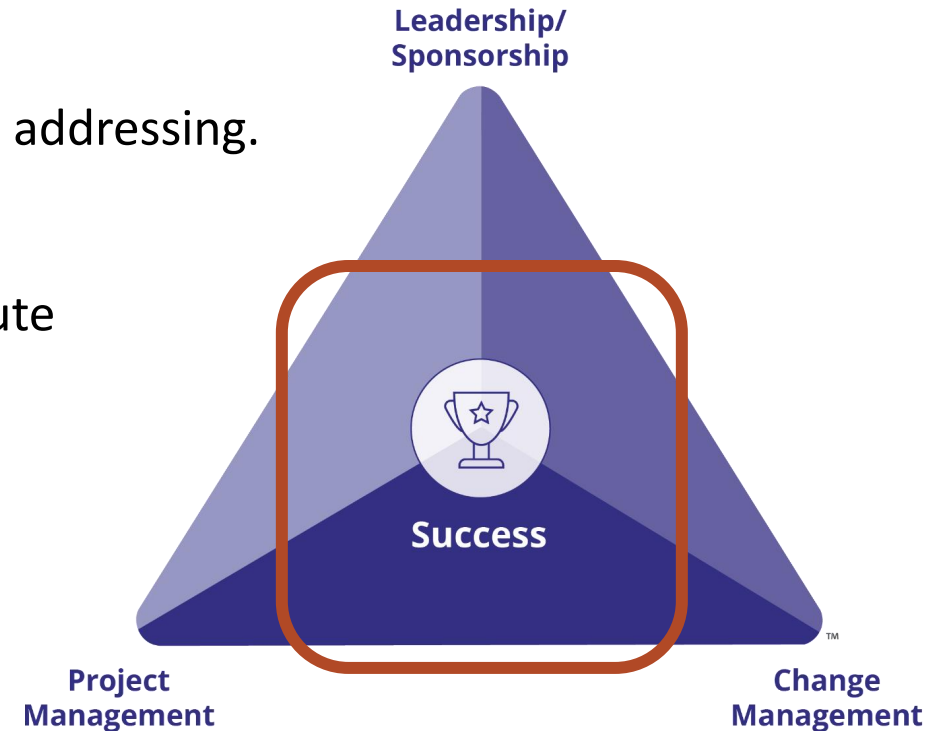


# Words to describe the impact when we are missing Change Management

# Success

- **The Reason For Change:**
  - The opportunity the organization is seizing or the issue it is addressing.
- **Project Objectives:**
  - What the project/initiative delivers or produces to contribute to solving the problem or realizing the opportunity?
- **Organizational Benefits:**
  - What the organization gains if the initiative is successful?

“The ‘there’ where we are going.”



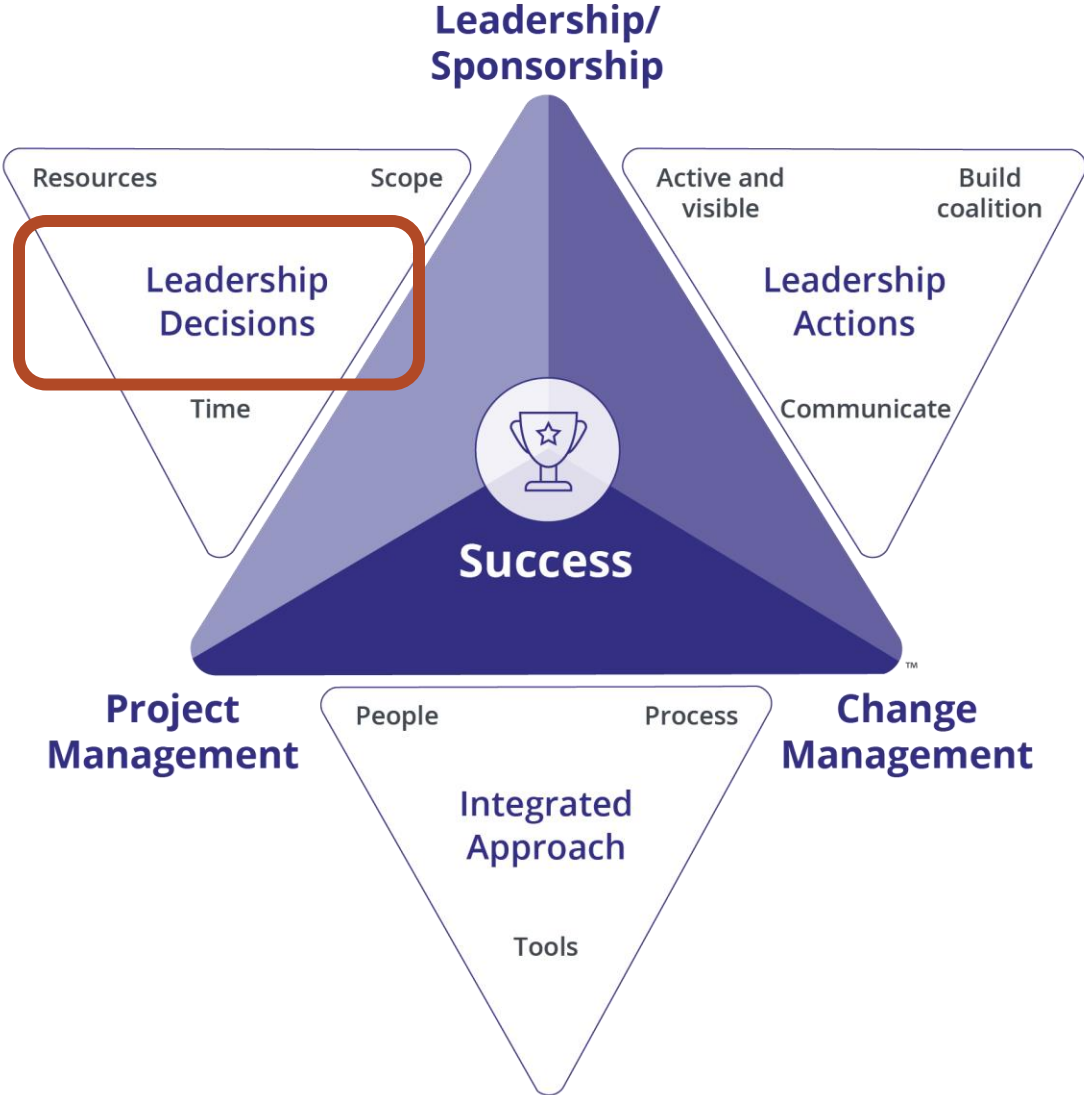
Prosci Change Triangle  
(PCT) Model



# Words to describe the impact when we are missing success

# Connections: Leadership Decisions

- Resources
- Scope
- Time

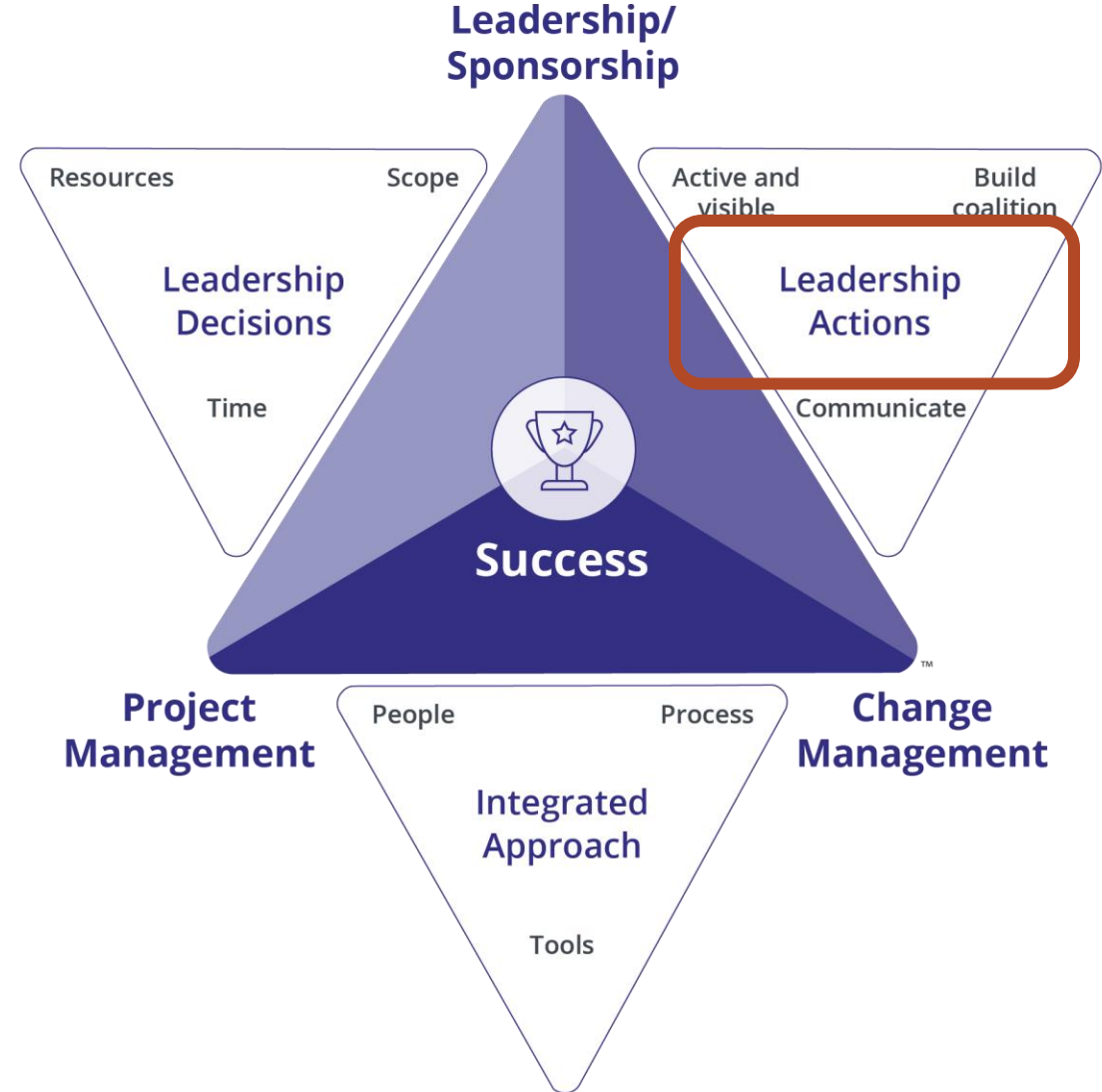


What needs to be designed, developed and delivered?



# Connections: Leadership Actions

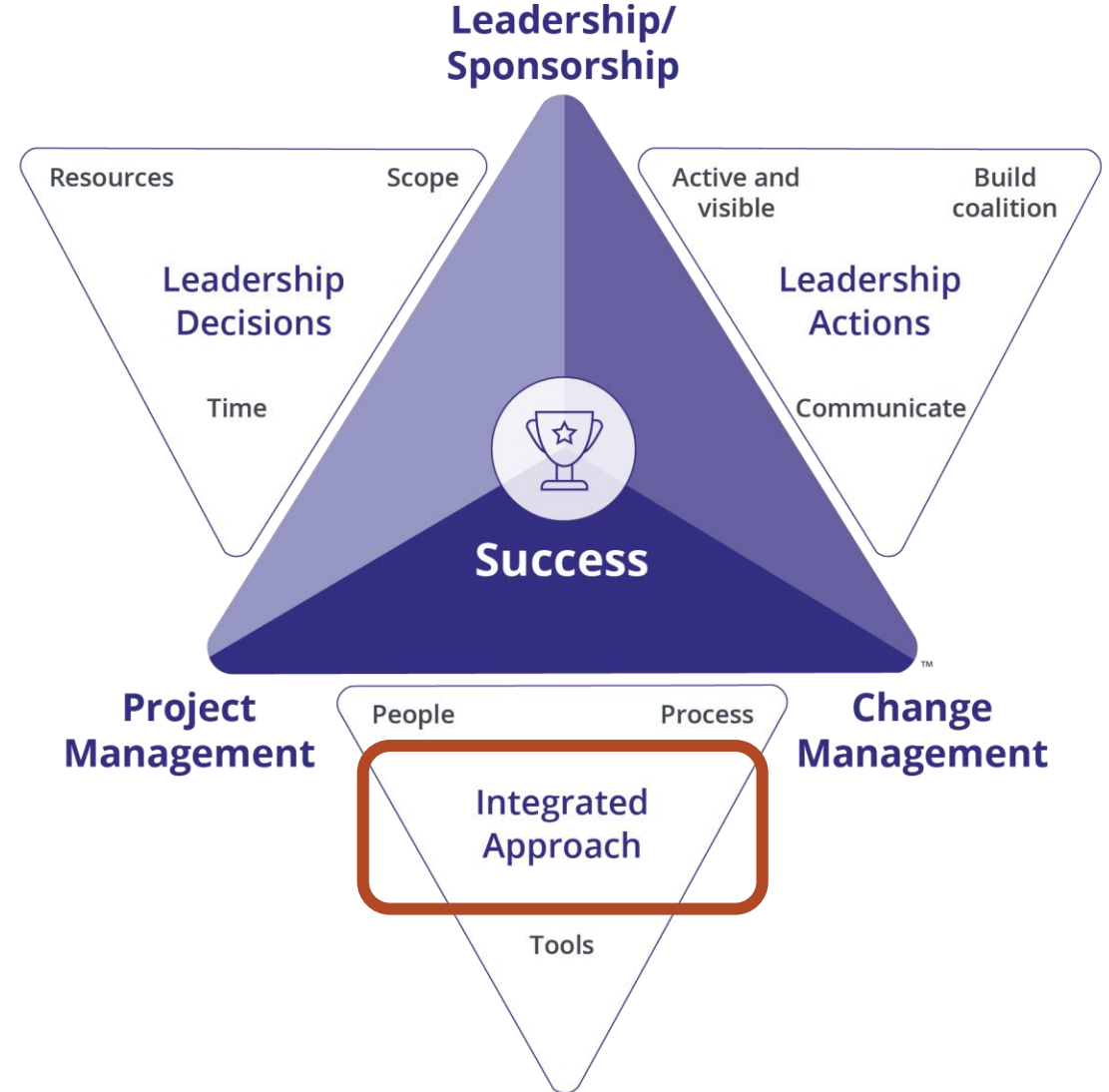
- Active and visible
- Build coalitions
- Communication



How leaders uniquely contribute to individual change journeys?

# Connections: Integrated Approach

- People
  - Who does the work?
- Process
  - How the work gets done?
- Tools
  - What we use to do the work?

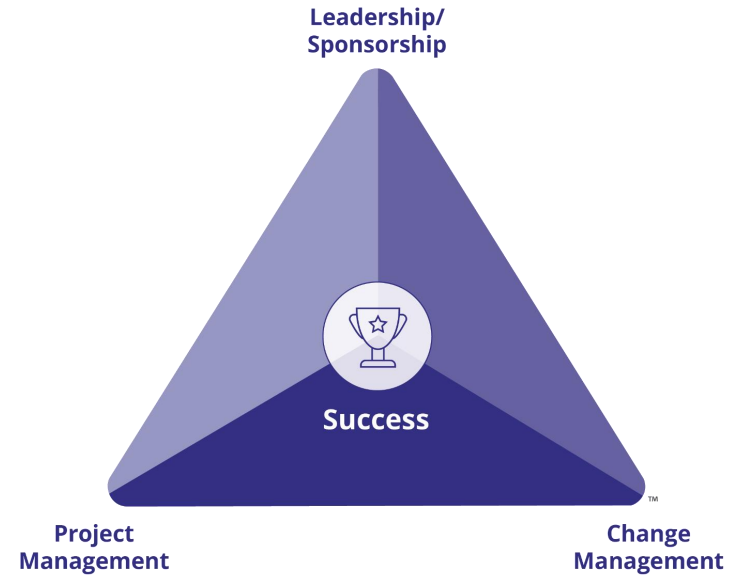


Complementary disciplines  
with a common objective



# Agenda

## The PCT Model: Tracking Project Health



### PCT Model

PCT Assessment

PCT Application

# Success

Success	Score: 1-3
1. Inputs into the change management process are defined (may include a business case, charter, scope, or plan).	<input type="checkbox"/>
2. Organizational benefits are fully defined (what the organization gains).	<input type="checkbox"/>
3. Project objectives are fully defined (what the project achieves).	<input type="checkbox"/>
4. Adoption and usage objectives are fully defined.	<input type="checkbox"/>
5. Units of measure for benefits and objectives are established.	<input type="checkbox"/>
6. Benefits and objectives are prioritized.	<input type="checkbox"/>
7. Benefit and objective ownership is designated.	<input type="checkbox"/>
8. People dependency of benefits and objectives is evaluated.	<input type="checkbox"/>
9. The definition of success is clear and ready to be communicated.	<input type="checkbox"/>
10. The sponsorship coalition is aligned to a common definition of success.	<input type="checkbox"/>
<b>Sum of points for Success (out of 30 total)</b>	<b>0</b>

# Leadership/Sponsorship

Leadership/Sponsorship	Score: 1-3
1. The change has a primary sponsor with the necessary authority over the people, processes and systems to authorize and fund the change.	<input type="checkbox"/>
2. The primary sponsor can clearly explain the nature of the change, the reason for the change, and the benefits for the organization.	<input type="checkbox"/>
3. The organization has a clearly defined vision and strategy.	<input type="checkbox"/>
4. The change is aligned with the strategy and vision for the organization.	<input type="checkbox"/>
5. Priorities are set and communicated regarding the change and other competing priorities.	<input type="checkbox"/>
6. The primary sponsor is resolving issues and making decisions related to the project schedule, scope and resources.	<input type="checkbox"/>
7. The primary sponsor is actively and visibly participating throughout the lifecycle of the change.	<input type="checkbox"/>
8. The primary sponsor is encouraging senior leaders to participate in and support the change by building a sponsor coalition.	<input type="checkbox"/>
9. The primary sponsor is building awareness of the need for the change directly with employees.	<input type="checkbox"/>
10. The primary sponsor is visibly reinforcing the change by celebrating successes and addressing resistance.	<input type="checkbox"/>
<b>Sum of points for Leadership/Sponsorship (out of 30 total)</b>	<b>0</b>



# Project Management

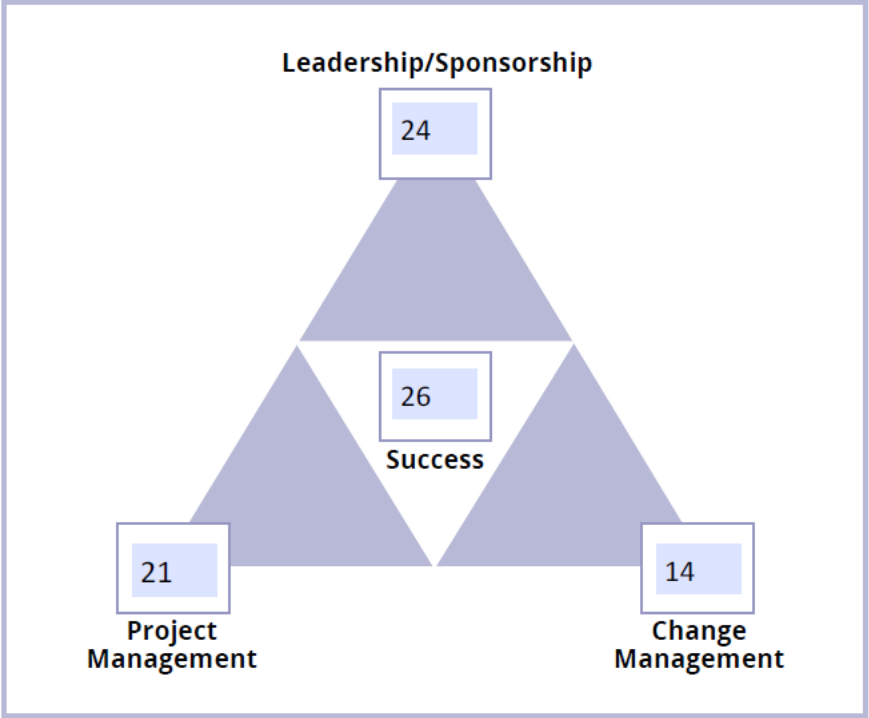
Project Management	Score: 1-3
1. The nature of the change is clearly defined including who is impacted and how.	<input type="checkbox"/>
2. The project has specific objectives.	<input type="checkbox"/>
3. The project has a clearly defined scope.	<input type="checkbox"/>
4. The project has a project manager assigned to manage the project lifecycle.	<input type="checkbox"/>
5. Project milestones are identified and a project schedule is complete.	<input type="checkbox"/>
6. A work breakdown structure with deliverables is complete.	<input type="checkbox"/>
7. Resources for the project are identified and acquired.	<input type="checkbox"/>
8. Periodic meetings are scheduled with the project team and key stakeholders to track progress and resolve issues.	<input type="checkbox"/>
9. The project manager understands the value of change management in ensuring the change will be adopted and used.	<input type="checkbox"/>
10. The Change Management Plan is integrated with the Project Management Plan.	<input type="checkbox"/>
<b>Sum of points for Project Management (out of 30 total)</b>	<b>0</b>

# Change Management

Change Management	Score: 1-3
1. The change is applying a structured change management approach to deliver the benefits to the organization.	<input type="checkbox"/>
2. An assessment of the change and its impact on individuals and the organization is complete.	<input type="checkbox"/>
3. An assessment of the change risk is complete.	<input type="checkbox"/>
4. The change has specific adoption and usage objectives.	<input type="checkbox"/>
5. An assessment of the strength of the sponsor coalition is complete.	<input type="checkbox"/>
6. A customized and scaled change management strategy with the necessary sponsorship commitment is complete.	<input type="checkbox"/>
7. The resources required to execute the change strategy and plans are identified, acquired and prepared.	<input type="checkbox"/>
8. Change management plans that will mitigate resistance and achieve adoption and usage are complete and are being implemented.	<input type="checkbox"/>
9. The effectiveness of change management is being monitored and adaptive actions are being taken if required to achieve adoption and usage.	<input type="checkbox"/>
10. The organization is prepared to own and sustain the change.	<input type="checkbox"/>
<b>Sum of points for Change Management (out of 30 total)</b>	<b>0</b>

# PCT Profile

## PCT Profile:



## 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

# How would you rate Success (Definition)?

High risk/threat  
(10-19)

Alert/possible  
risk (20-24)

Strength (25/30)

# How would you rate Leadership/Sponsorship?

High risk/threat  
(10-19)

Alert/possible  
risk (20-24)

Strength (25/30)

# How would you rate Project Management?

High risk/threat  
(10-19)

Alert/possible  
risk (20-24)

Strength (25/30)

# How would you rate Change Management?

High risk/threat  
(10-19)

Alert/possible  
risk (20-24)

Strength (25/30)

# Example PCT Profiles



- Initiation
- Entire effort in threat



- People and technical sides ready
- Not sure where to go



- Early-stage
- Project shaping



- Leader and people mobilized
- Technical-side threat



- Building momentum
- Leadership/sponsorship driven



- Leaving the people side of change to chance





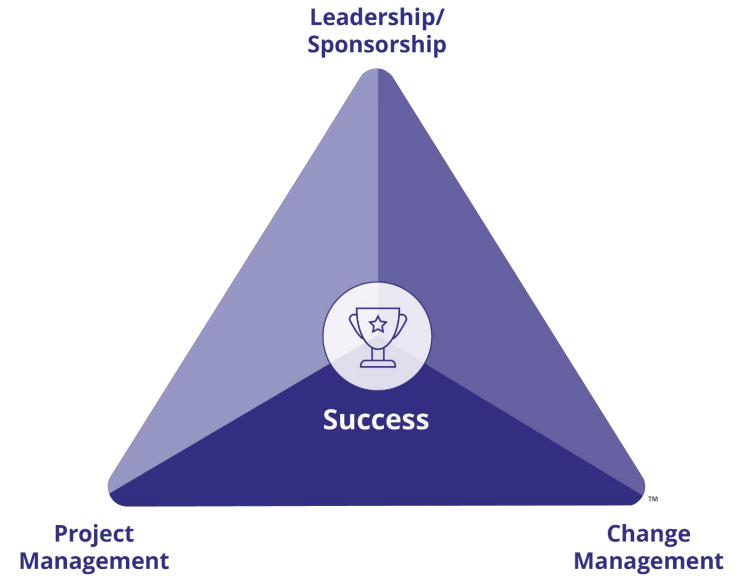
# How have you used the PCT Model in your change work?

Start the presentation to see live content. For screen share software, share the entire screen. Get help at [pollev.com/app](https://pollev.com/app)



# Agenda

## The PCT Model: Tracking Project Health



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## PCT Model

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## PCT Assessment

## PCT Application

# PCT Applications

Conduct Assessment

Evaluate Project Health

Identify Risk Factors

Drive Next Steps

Track Progress Over Time

Examine the Portfolio

Create Shared Vision

# Conduct Assessment

PCT Assessment

Assessing Project Health

PEOPLE. CHANGE. RESULTS.™

### PCT Assessment Analysis

**PCT Profile:**

**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:**

---

### PCT Assessment

The Prosci Change Triangle (PCT) Model is a simple but powerful framework for understanding the four critical aspects of any successful change effort:

- **Success:** clarity on the aim or purpose of the initiative.
- **Leadership/sponsorship:** provides strategy, direction and guidance.
- **Project management:** addresses the technical side of change by designing, developing and delivering the solution.
- **Change management:** addresses the people side of change by enabling people to engage, adopt and use the solution to achieve results and outcomes.

**Why:**  
The PCT Assessment is used to position the project for success by assessing project health across the four critical aspects at a point in time. If a project is weak in any of the four elements, it will struggle or fail. PCT Assessment scores are a leading indicator of the potential for a successful implementation.

The PCT Model is valuable for project teams and change management professionals in a number of ways:

- Provides project teams with common language and context for the four elements of successful change.
- Positions the unique contribution of change management relative to project management and leadership/sponsorship.
- Evaluates the health of an initiative at a point in time. Through repeated application, it evaluates progress over the project lifecycle.
- Identifies organizational competencies and gaps by looking at assessment results from multiple projects.

**When:**  
Complete an initial PCT Assessment early in the lifecycle of the project to establish a baseline. Conduct the assessment again at key points during the project to see if scores are improving. Each time the assessment is conducted, create a set of action plans to improve performance where scores are low.

**Who:**  
The PCT Assessment can be completed by the change management team, project team, senior leaders and key business leaders from the impacted groups.

**PCT Assessment** Rank each factor on a 1-3 scale: 1 = inadequate, 2 = adequate, 3 = exceptional

Success	Score: 1-3
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.	
<b>Sum of points for Success (out of 30 total)</b>	<b>0</b>

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# PCT Applications

Conduct Assessment

Evaluate Project Health

Identify Risk Factors

Drive Next Steps

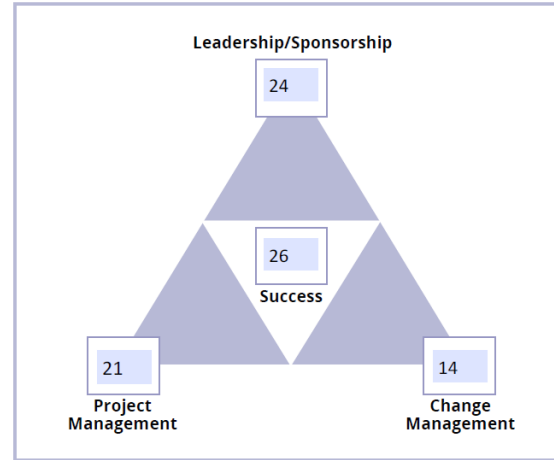
Track Progress Over Time

Examine the Portfolio

Create Shared Vision

# Evaluate Project Health

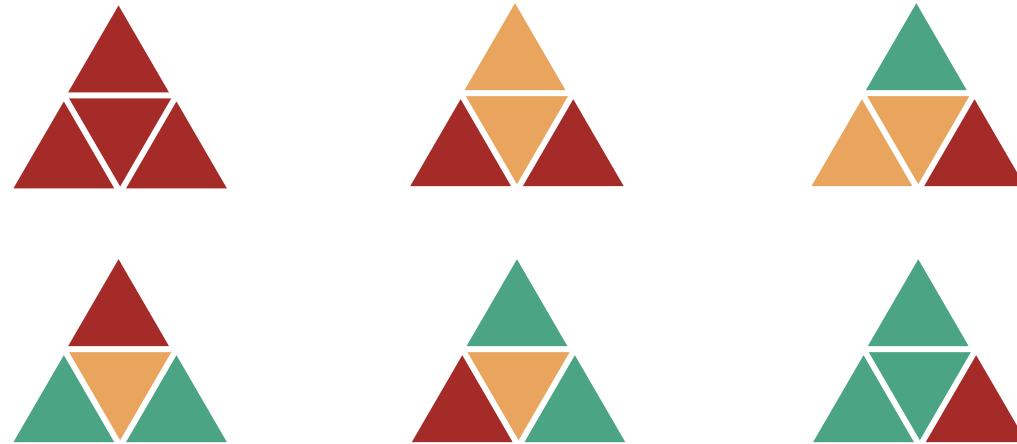
PCT Profile:



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



# PCT Applications

Conduct Assessment

Evaluate Project Health

Identify Risk Factors

Drive Next Steps

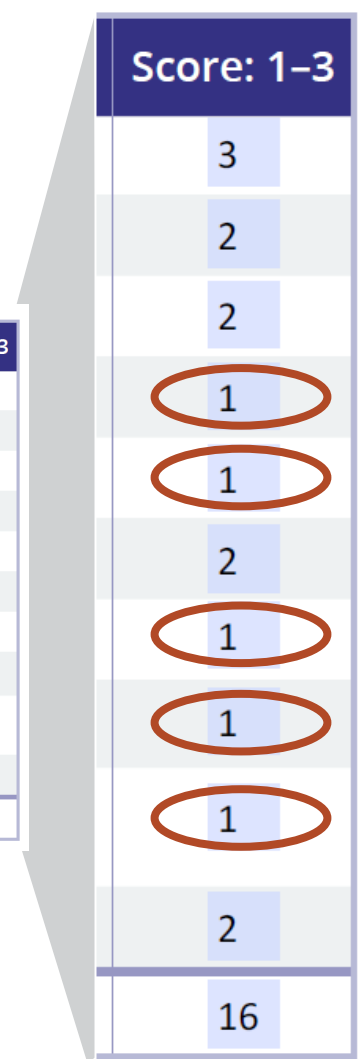
Track Progress Over Time

Examine the Portfolio

Create Shared Vision

# Identify Risk Factors

Change Management	Score: 1-3
1. The change is applying a structured change management approach to deliver the benefits to the organization.	3
2. An assessment of the change and its impact on individuals and the organization is complete.	2
3. An assessment of the change risk is complete.	2
4. The change has specific adoption and usage objectives.	1
5. An assessment of the strength of the sponsor coalition is complete.	1
6. A customized and scaled change management strategy with the necessary sponsorship commitment is complete.	2
7. The resources required to execute the change strategy and plans are identified, acquired and prepared.	1
8. Change management plans that will mitigate resistance and achieve adoption and usage are complete and are being implemented.	1
9. The effectiveness of change management is being monitored and adaptive actions are being taken if required to achieve adoption and usage.	1
10. The organization is prepared to own and sustain the change.	2
<b>Sum of points for Change Management (out of 30 total)</b>	<b>16</b>



# PCT Applications

Conduct Assessment

Evaluate Project Health

Identify Risk Factors

Drive Next Steps

Track Progress Over Time

Examine the Portfolio

Create Shared Vision

## Drive Next Steps

What specific factors need to be addressed to improve project health?

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

# PCT Applications

Conduct Assessment

Evaluate Project Health

Identify Risk Factors

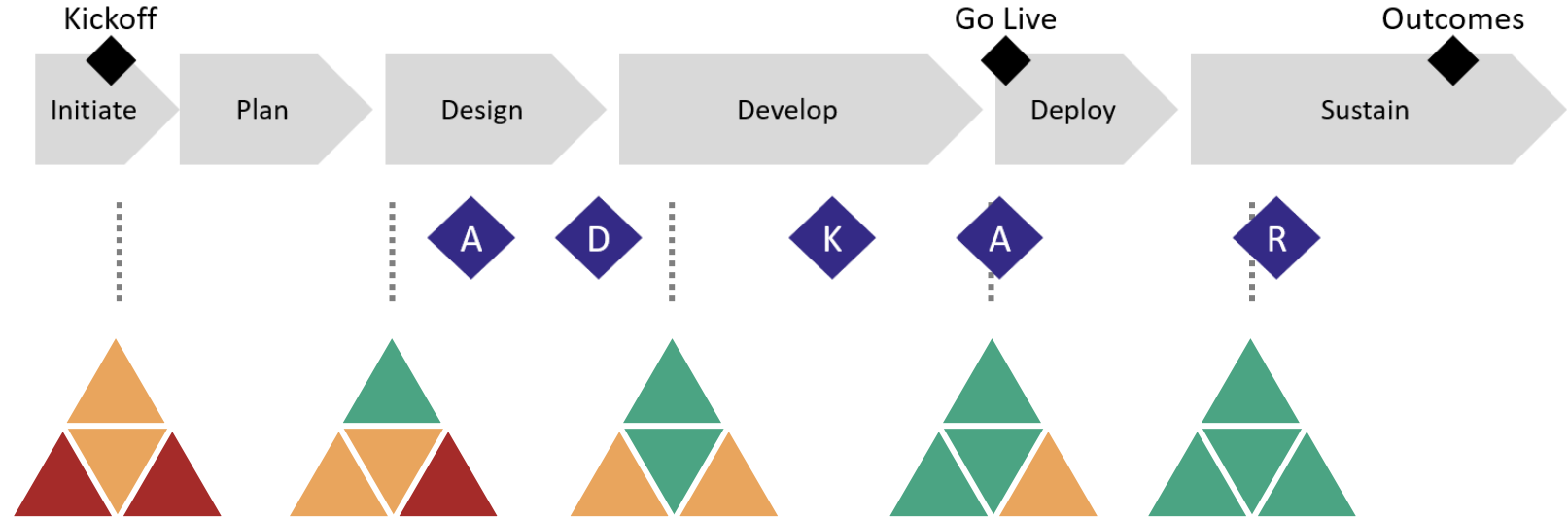
Drive Next Steps

Track Progress Over Time

Examine the Portfolio

Create Shared Vision

## Track Progress Over Time



Assessment Name	Date Created	S	L/S	PM	CM
Initiate	01 Jan	22	21	17	12
Plan	01 Mar	24	26	21	18
Design	01 Apr	27	27	23	21
Develop	01 Jun	29	28	26	24
Deploy	01 Sep	29	29	27	26

# PCT Applications

Conduct Assessment

Evaluate Project Health

Identify Risk Factors

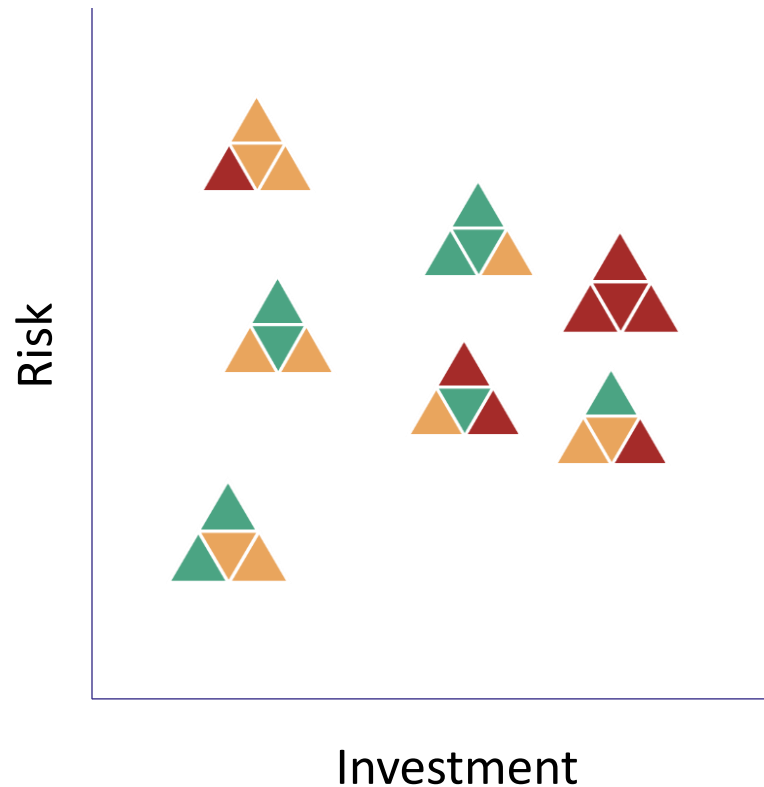
Drive Next Steps

Track Progress Over Time

Examine the Portfolio

Create Shared Vision

## Examine the Portfolio



Projects	S	L/S	PM	CM
Project A	Orange	Orange	Red	Orange
Project B	Orange	Green	Orange	Red
Project C	Orange	Green	Green	Orange
Project D	Green	Green	Green	Orange
Project E	Red	Green	Orange	Red
Project F	Green	Green	Orange	Orange
Project G	Red	Red	Red	Red



# PCT Applications

Conduct Assessment

Evaluate Project Health

Identify Risk Factors

Drive Next Steps

Track Progress Over Time

Examine the Portfolio

Create Shared Vision

Create  
Shared  
Vision





# Which PCT Application are you most interested to try?

Conduct Assessment

Evaluate Project Health

Identify Risk Factors

Drive Next Steps

Track Progress Over Time

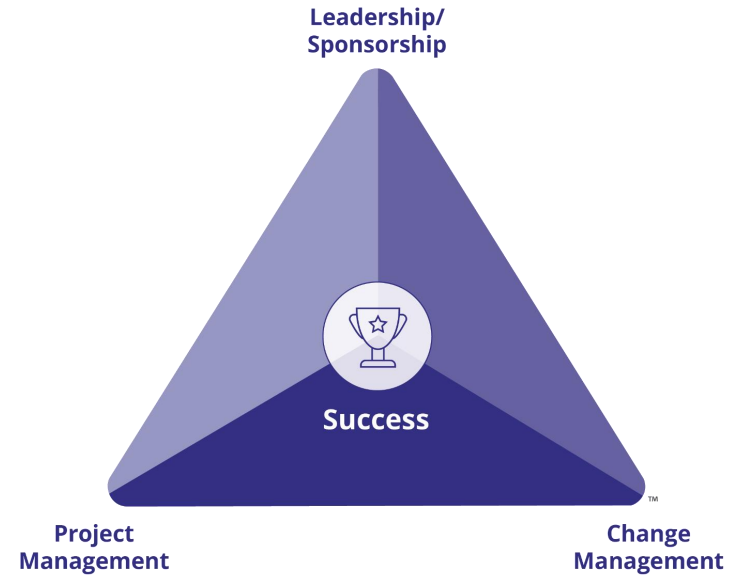
Examine the Portfolio

Create Shared Vision



# Agenda

## The PCT Model: Tracking Project Health

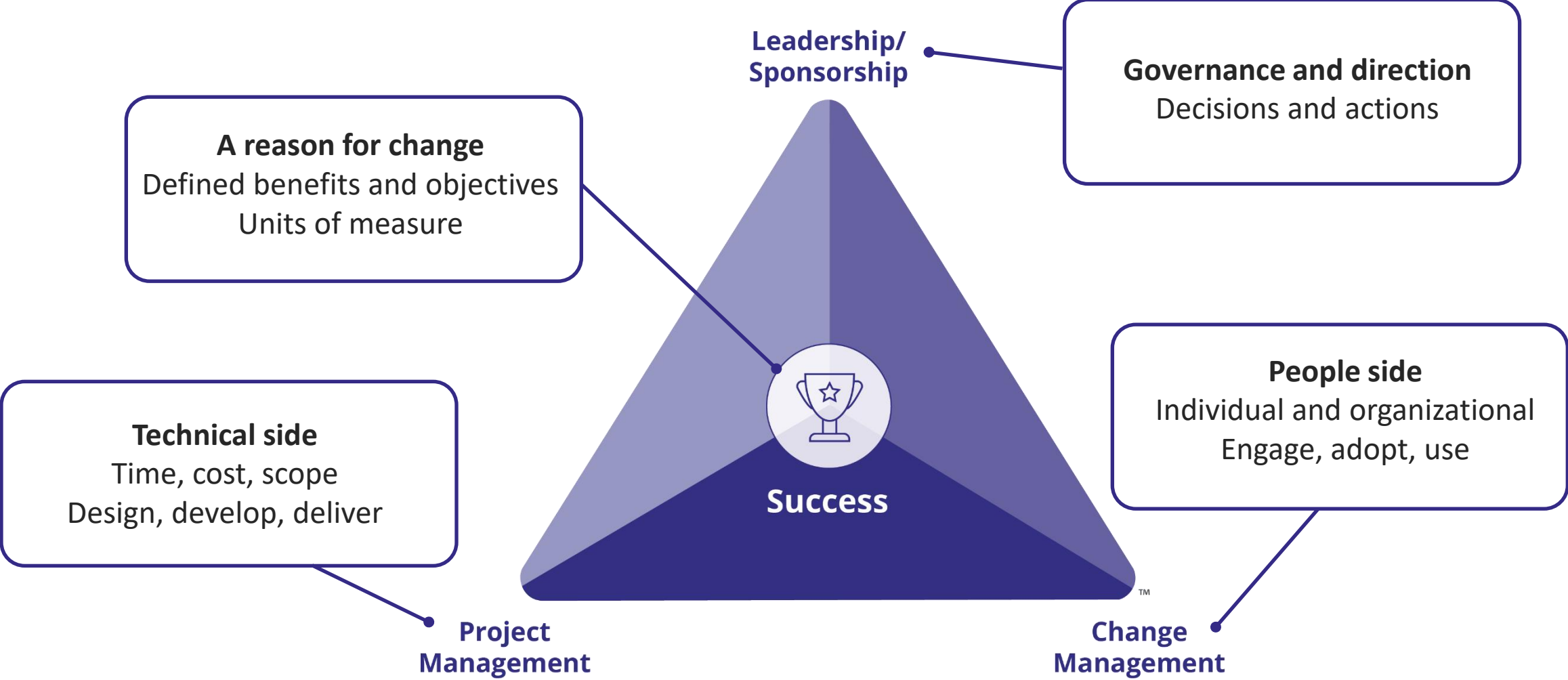


### PCT Model

PCT Assessment

PCT Application

# PCT Model: Critical Aspects for Success



Topic	Date
The 5 Building Blocks of Individual Change	Friday 28 <sup>th</sup> May, 9am BST
Project Management and Change Management: An Integrated Approach	Friday 4 <sup>th</sup> June, 9am BST
Connect and Activate your Change Roles	Friday 25 <sup>th</sup> June, 9am BST
Fueling the Ambition to Change how we do Change	Friday 9 <sup>th</sup> July, 9am BST
Fueling the Ambition to be a Leader of Change	Friday 16 <sup>th</sup> July, 9am BST

[www.cmcpartnership.com/change-management-webinars](http://www.cmcpartnership.com/change-management-webinars)



	Europe	Asia	South Africa
Prosci® Change Management Practitioner Certification	01-03 June, GMT (Virtual) 08-10 June, GMT (Virtual) 08-10 June, CET (Italian/Virtual) 15-17 June, GMT (Virtual)	08-10 June , SGT(Virtual) 22-24 June, Singapore (In-person) 06-08 July , SGT (Virtual) 21-23 July, Singapore (In-person)	Available privately for organisations
Prosci® Intersection of Agile and Change Management Workshop	12 July, GMT (Virtual)	01 July, SGT (Virtual)	Available privately for organisations
Prosci® Enterprise Change Management (ECM) Bootcamp	13 September, GMT (Virtual)	02 July, SGT (Virtual)	Available privately for organisations
Project Management for Change Skills Builder Workshop	07 June, GMT (Virtual)	29 June, SGT (Virtual)	Dates coming soon
Prosci® Delivering Project Results Workshop	Available privately for organisations	30 June, SGT (Virtual)	Available privately for organisations
Prosci® Train-the-Trainer Programme	07-08 September, GMT (Level 1) 15-16 September, GMT (Level 2)	Dates coming soon	Available privately for organisations

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