

# 7 REASONS ORGANIZATIONS RESIST ADOPTING A PPM TOOL AND HOW TO DEAL WITH THEM



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# Contents

<b>INTRODUCTION</b> .....	4
Why adopt a PPM solution? .....	4
Internal challenges to PPM adoption .....	4
Creating an adoption plan .....	4
<b>LACK OF ORGANIZATIONAL CLARITY</b> .....	5
Minimum requirements .....	6
<b>HOSTILITY</b> .....	7
Attitude .....	8
7 reasons organizations resist adopting a PPM tool .....	9
Ad hominem resistance .....	10
Freedom to resist.....	10
First-order measures .....	11
Tactical measures.....	11
<b>HOW TO DESIGN AN ADOPTION PLAN:</b>	
<b>3 FUNDAMENTAL INGREDIENTS</b> .....	12
Expectations at 30, 60 and 90 days.....	13
Rewards for use.....	13
Project governance: annual increments.....	13

# INTRODUCTION

## WHY ADOPT A PPM SOLUTION?

A Project Portfolio Management tool or PPM software responds to a basic need in any corporate environment: **the coordination, monitoring and control of projects to obtain the best possible use of the limited resources available.**

The projects that a PPM tool controls can be internal or external; they can be about innovation or IT, but also affect strategy, marketing or sales, even extending to cross-sectional and transformation projects.

PPM is not just about doing projects right, but about doing the right projects, and companies who understand this will reap the rewards. **The benefits** that flow from introducing **a PPM tool** include:

- ▶ A one stop shop for **collaborative working** between departments and teams
- ▶ Access to quality data as the basis for **decision making**
- ▶ Reduction in low value / **non-strategic projects** that waste time and resources
- ▶ **Speed up** project **delivery times**
- ▶ **Save on administrative work**, through automation of data collection

## INTERNAL CHALLENGES TO PPM ADOPTION

To embark on the journey towards a mature PPM strategy (one in which the PMO acts as the strategic arm of the business) you should understand the barriers you will face. The main obstacles to successfully embedding a PPM tool are:

- a) Lack of clarity in the command structure
- b) Failure to define objectives and link them to projects
- c) Resistance from stakeholders

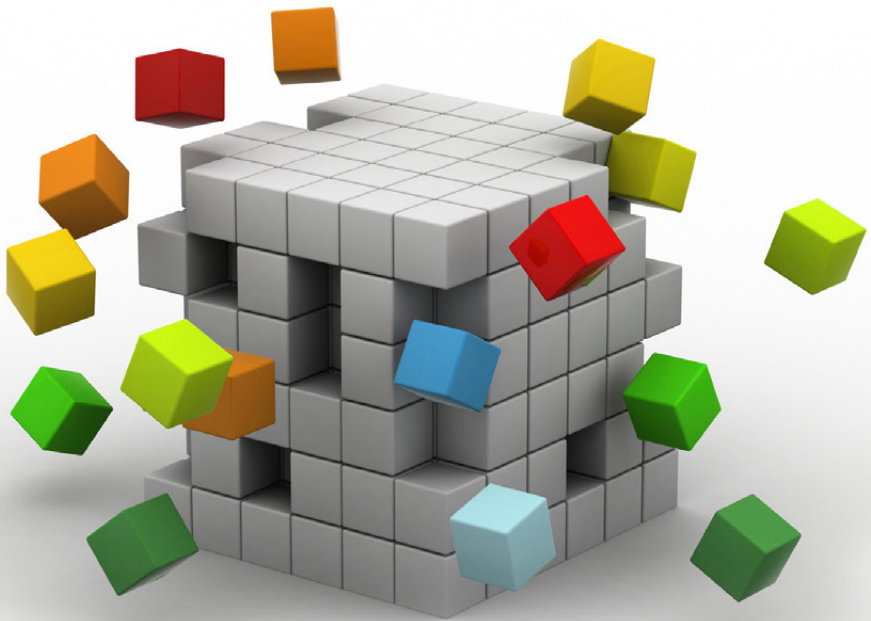
## CREATING AN ADOPTION PLAN

Businesses have to change or risk becoming uncompetitive or unprofitable. But with change naturally comes resistance. So we recommend creating an adoption plan focused on "winning hearts and minds" and increasing chances of successful implementation. This will serve two purposes:

- a) Ensure the management of the project portfolio is properly integrated into the overall structure of the organization
- b) Minimize stakeholders' resistance

In the rest of this guide, we present an approach that can be used by any decision maker to lay the foundations for PPM software adoption.

LACK OF  
ORGANIZATIONAL  
CLARITY





## LACK OF ORGANIZATIONAL CLARITY

One of the main functions of a Project Management Office is to ensure consistent and predictable processes to avoid this confusion. We are not going to analyze this topic in depth because so much has been written already about it.

But it is worth highlighting some essential criteria for a PPM tool to function correctly. If these criteria are met then it is likely that teams throughout the company will pull in the same direction and the PPM will undoubtedly add value to the business.

### 9 MINIMUM REQUIREMENTS FOR CRYSTAL CLEAR IMPLEMENTATION:

1. Define **hierarchy and responsibilities**, especially of the Project Manager and the PMO as drivers of the PPM strategy.
2. **Communication**: set up formal channels and agree terminology (common dictionary).
3. Define **metrics and how to assess progress**, for example, hours, percentages, costs.
4. Define **criteria for project approval** and workflow.
5. Allocate **responsibility for resource planning and management**.
6. Put in place **standardized reporting mechanisms** for all elements, from discrete tasks to the entire portfolio.
7. **Evaluation of projects according to strategic objectives**.
8. **Map the integration needed** for PPM software to co-exist with technology already in use within the organization (ERP, CRM, Business Intelligence, etc.), possibly through an open API.
9. **Tailor the software** according to the specific needs of the company.

All this needs to be in place **before** you deploy the tool. **Clarity** is the key to a seamless transition and will prevent team members from simply throwing their hands up in despair and rejecting the new approach before it even gets off the ground.

HOSTILITY



# HOSTILITY

A user's willingness to adopt the tool is determined by two factors that companies should watch for:

1. **Their attitude** (in favor of or against the software) and
2. **Their freedom to resist.**

Be prepared to tackle both simultaneously, striking a balance between encouraging a positive mindset among stakeholders while limiting their freedom to ignore the rules and not use the system.

## ATTITUDE

During deployment it is important to realize that **hostility to the tool usually has nothing to do with whether they know anything about it or have ever used it before.** Often users' initial attitude is one of bias. A common task in change management plans is to dispel bias, communicating the reasons for adoption and its advantages

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***"Hostility to the tool often has nothing to do with whether they know anything about it or have ever used it before."***

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In general, the initial attitude is likely to be an emotional one, based on the individual, their personality, motivation and level of knowledge. At this point we can divide users into three broad professional profiles, although there may be others.

The objective is to increase a positive mindset, while identifying and eliminating resistance in a rational and knowledge-based manner. We advise the following measures for all profiles:

- ▶ **Evangelize:** Beat the drum for the new system. What will the organization achieve with it and what will the impact be on the individual. Be honest and make it clear that if it requires work, it is because of the benefits.
- ▶ **Initial technical training** and ongoing training
- ▶ **Identify allies:** Who is most on board? What can be done to empower them?
- ▶ **Find success cases (projects)** that reinforce the general message about the benefits expected.



**Table: 7 reasons organizations resist adopting a PPM tool and how to deal with them**

**Resistance from Team Members**

OBJECTION	ACTION
It is more work	<ul style="list-style-type: none"> <li>▶ Provide evidence of the overall benefits</li> </ul>
I am being micromanaged	<ul style="list-style-type: none"> <li>▶ Point out that they can highlight their contributions</li> </ul>
I do not like the tool	<ul style="list-style-type: none"> <li>▶ Listen to them</li> <li>▶ Accept objective complaints</li> <li>▶ Analyze and dispel subjective ones</li> </ul>

**Resistance from Project Manager**

OBJECTION	ACTION
I work at my leisure	<ul style="list-style-type: none"> <li>▶ You will have the same freedom</li> <li>▶ It's an opportunity to showcase their skills</li> <li>▶ Provide evidence of the overall benefits</li> </ul>
Reporting before delivery	<ul style="list-style-type: none"> <li>▶ Identifying risks ahead of time allows you to defuse them</li> </ul>
I do not like the tool / I did not participate in the selection process	<ul style="list-style-type: none"> <li>▶ Listen to them</li> <li>▶ Accept objective complaints</li> <li>▶ Analyze and dispel subjective ones</li> <li>▶ Customize the tool</li> </ul>
I do not want to face the Team Members resistance	<ul style="list-style-type: none"> <li>▶ Let's work together to persuade them</li> <li>▶ Make them part of this plan</li> </ul>

**Resistance of the department head  
(line manager of the team members)**

DIAGNOSED RESISTANCE	ACTIONS
Don't want to face the resistance of Project Managers	<ul style="list-style-type: none"> <li>▶ Let's work together to persuade them</li> <li>▶ Make them part of this plan</li> </ul>
I do not like the tool / I did not participate in the selection process	<ul style="list-style-type: none"> <li>▶ Listen to them</li> <li>▶ Accept objective complaints</li> <li>▶ Analyze and dispel subjective ones</li> <li>▶ Customize the tool</li> </ul>



## AD HOMINEM RESISTANCE

This is the most lethal resistance of all because it is irrational, based on the ad hominem fallacy: I think an argument is wrong because of the person who champions it.

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**“Ad hominem resistance is the most lethal of all, because it is irrational and usually occurs among top management where politics play a greater role”**

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In other words: if the initiative comes from an individual that I do not respect, it is irrelevant whether I like the tool or not, because I will always reject it. This is usually a problem at senior levels where politics play a greater role and there is more at stake in decision making.

We are not going to analyze the actions that could minimize this resistance, because it goes beyond the purpose of this guide. Suffice it to say that while in-house politics are difficult to manage, they are easy to foresee. And it may be possible to dis-empower naysayers by exposing the weakness of their arguments and taking on board any objective complaints against the tool.

## FREEDOM TO RESIST


Attitude has more or less impact depending on each individual's freedom to boycott implementation.

Although logically resistance from senior managers can have a great impact, in practice those lower down the chain tend to exert the most influence: **a PPM tool is a pyramid of information**; when data input at ground level is lacking, the entire building can collapse.

As a result, if middle managers foresee resistance from their team, they may give up because they know they will not be able to report back to bosses properly.

For example, project managers will occasionally enter their team's hours to be able to report to management. It might seem absurd, but it isn't: they prefer to do the work themselves, rather than face the team members' resistance directly (or even worse, face the team members' line managers).

We have also seen cases of PMOs working hard two days before the deadline to collect information related to the entire month when in reality this information should be in the system already. The objective, in this case, is to limit the freedom not to use the system.



By the way, if the attitude of employees is already positive, nobody will notice the lack of freedom. It's like forbidding people to drop litter on the streets: if citizens are conscientious about disposing of rubbish correctly, they will hardly even notice legislation that requires them to do so.

Here are some measures that we have found to be effective. Be realistic. Take into account the situation on the ground in your organization before trying to enforce the new rules.

## FIRST-ORDER MEASURES (ADOPTION POLICIES)

- ▶ **Obligation:** Top-down, management is the driver; policies are not expressed as recommendations, but as mandates.
- ▶ **Measures in case of non-compliance:** A leader or a body with organizational weight and sufficient authority should be appointed to decide over disciplinary measures.
- ▶ **Transparency:** Rewards and disciplinary measurements should be clearly communicated to all stakeholders in the process.

## TACTICAL MEASURES

- ▶ **Functional obligations.** It is about enforcing compliance based on clearly communicated organizational standards. If team members are required to report on hours and project managers have to report on progress, then this is obligatory. There can be no opt outs or exceptions to the rules.
- ▶ **Procedure.** Create monitoring systems for tasks, projects, programs and the entire portfolio based solely on:
  - ▶ **Reporting.** No progress meeting can take place without support from data taken from the platform; if the data that is supposed to be in the system hasn't been inputted, it does not exist.
  - ▶ **Subsidiarity.** No one can do anyone else's work: the PMO shouldn't do the job of project manager and the project manager shouldn't do the work of team members.

# How to design an adoption plan:

Three  
Fundamental  
Ingredients

Expectations at 30,  
60 and 90 days



Rewards for use



Project  
Governance





## HOW TO DESIGN AN ADOPTION PLAN: 3 FUNDAMENTAL INGREDIENTS

At this point it should be clear that **adoption of the tool is not a spontaneous or natural process**. On the contrary, very clear planning must be put in place that analyzes trends in usage over time.

### EXPECTATIONS AT 30, 60 AND 90 DAYS

The use of a PPM tool must be defined according to the needs of the organization, specifying what work-flows, criteria and responsibilities are going to be introduced into the software.

Once these processes are well defined, an adoption plan usually sets objectives and metrics at 30, 60 and 90 days. This allows companies to assess adoption on the basis of quantitative data, rather than relying on anecdotal impression or notions about the success or failure of the new software. If metrics point at under-performance, contingency plans can be activated in a timely manner.

### REWARD USAGE

We favor using 'the carrot' as well as 'the stick'. And 'carrot' doesn't necessarily mean financial remuneration. A fundamental aspect of adoption plans is that **users should benefit directly from the data that they input into the system**.

You can reward stakeholders for consistent use of the tool, by demonstrating the value of the new processes. For example, point out that they'll access information that makes them more effective in hitting their targets and cuts down on mundane administrative work. Overall, the system will empower users by promoting transparency with regards to progress on the entire portfolio. Ultimately, this will allow managers the ability to make better go /kill /hold decisions that will improve performance.

It is also essential to take stock of users' perceptions of the tool to evaluate and confirm governance plans (see next point).



## PROJECTS GOVERNANCE: ANNUAL INCREMENTS

**In corporate environments, the adoption of PPM software is often coupled with the implementation of a project governance model, usually centered around the creation of a Project Management Office, or the PMO's evolution towards greater maturity.**

Management of the use of the PPM tool during the first three months is aimed at achieving a governance model for projects that adheres more closely to daily operations than a yearly plan. This allows you to assess the situation on an ongoing basis and renegotiate next steps whenever discrepancies between the plan and actual progress are identified. On the most simple level annual improvements in the governance model should be as follows:

- ▶ **First year:** standardization of information and reporting processes. The goal is for you to keep track of all initiatives and projects underway, as well as how much is being spent on them. This first year is for embedding continuous evaluation processes that allow PPM tools to function properly.
- ▶ **Second year:** criteria for project acceptance. Once existing projects are properly catalogued and measured, approval for new projects will be subject to a strict set of criteria. For example, projects of more than €50,000 may not be accepted if they are not strategic or lack corporate sponsorship.
- ▶ **Third year:** Planning is centralized. When there is already a strong project culture in which the value of each project is clearly communicated, the PMO will assume a strategic role, planning which projects are initiated and how they are assigned financial and human resources.



## Turn your organization into a competitive machine

At ITM Platform we are passionate about helping organizations simplify processes and get results. We have created the perfect solution to manage your project portfolio in an agile, uncomplicated way. In addition to offering all the benefits of integrated project management, our rapid configuration model allows you to set up a PMO within a few days and with the minimum of initial training.

Write to [info@itmplatform.com](mailto:info@itmplatform.com) to find out more about how we can help your organization.