

# Effective Project and Change Sponsorship

GETTING THE MOST FROM YOUR STRATEGIC INVESTMENTS

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*This book is dedicated to:*

*My wonderful wife, Eva*

*Incredible mom*

*Remarkable daughters—Kayla and Maya*

*I am inspired and empowered by your endless love and support*

*Love you all*

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# INTRODUCTION

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In their search for improved efficiency and performance, an increasing number of organizations have started to realize that the challenges surrounding project and change *sponsorship* are a major cause preventing them from improving their bottom lines. This book looks at the gaps, issues, and problems with both project and change sponsorship, and offers practical approaches and solutions to these challenges. This includes how to better define the exact role of the sponsor and his/her responsibilities and boundaries, as well as focusing on increasing the awareness around what effective project and change sponsorship looks like.

When it comes to project and change management, there are misconceptions surrounding the area of sponsorship. Project and change sponsorship are rarely packaged together under the same umbrella, and while they are two different things, the sponsors of projects and those of change initiatives have similar roles, responsibilities, and characteristics. This book deals with both *types* of sponsorship—change and project. It also explores the role of the sponsor in agile projects, including the sponsor's relationship with the product owner and other stakeholders.

## BOOK OBJECTIVES

This book examines project and change sponsorship: the need for an effective sponsor, the challenges with sponsorship as we know it, and the benefits that effective sponsorship introduces to organizations. It explains how improving the practices around sponsorship can create a ripple effect across the entire organization. In a similar fashion to a positive interpretation of the butterfly effect, all it takes are some small adjustments to sponsorship in order to yield significant organizational benefits.

This guide offers a unique approach on how to organize thoughts and ideas around the roles of the project and the change sponsor, and introduces structure around what the sponsor should look for, measure, ask about, and do at different

stages of the project or the change initiative. Readers will explore the types of challenges that sponsors face and the way these challenges manifest—for easier and earlier detection. We will identify the root causes of sponsorship-related issues as a key step to systematic problem solving. Many will be surprised to learn that most sponsorship-related problems stem from a limited number of root causes. Furthermore, most of the root causes are related to common types of organizational problems that bring us back to the basics, such as time management, prioritization, and accountability.

From here, this book applies techniques to guide readers through the process of finding short-term fixes to problems, along with an approach for long-term resolutions that will become preventive measures. Many of the concepts in this book are simple and straightforward, yet most organizations have not made a consolidated attempt, in context, to fix them once and for all.

## WHAT MAKES THIS BOOK DIFFERENT?

This book is a valuable repository of knowledge, concepts, and techniques for project and change sponsors—guiding them to success. It is essentially the first attempt to incorporate the good from project management, business analysis, change management, and agile while creating awareness and knowledge of the sponsorship role. In addition to the context those four areas offer, this book also provides a look into how to become a more effective manager (a sponsor’s “day job”), which will help free up time, focus, and capacity for senior managers to become better sponsors.

This unique guide details the role of the sponsor in the context of organizational change—posing critical questions that the sponsor needs to introduce in order to ensure that there is clarity about the reason for the change, the change objectives, and the change outcome. There is also a discussion on how to build a clear and meaningful vision, as well as how to ensure that once the change is *done*, the organization is ready for the next one.

## THE STRUCTURE OF THIS BOOK

*Chapter 1* provides an overview of what sponsorship is, along with a discussion on the two *aspects* of sponsorship that this book covers: project (including sponsorship in agile environments) and change. The chapter continues with a review of the common challenges that sponsors face, as well as the challenges that organizations face as a result of deficiencies in project and change sponsorships. It will provide a high-level overview of the main causes that lead to sponsorship-related problems, and this will lead to a discussion on the context around sponsorship—including governance, portfolio management, and the project management office (PMO). The chapter also features a comparison between project and change sponsorship,



along with the nuances, subtleties, and differences between these areas. It then explores how to deliver organizational success by connecting project and change management, including how sponsors should deal with their respective change managers, project managers, and teams. Finally, the chapter provides some practical advice on how to establish a meaningful feedback loop so the sponsor can remain informed and maintain context.

*Chapter 2* focuses on where to begin the process of *fixing* the problems and challenges around sponsorship. It starts with a list of challenges in the form of short scenarios, or vignettes, that represent common situations around sponsorship in many organizations. It then progresses to exploring common symptoms or signs that allow practitioners to easily identify when these conditions present themselves—or are about to. Early detection of these items helps us become more proactive in search of a solution. The chapter then takes a deeper look into a set of likely root causes that lead to, or at least contribute to, the challenges that were introduced.

*Chapter 3* serves as the core of the tangible actions and considerations for the project and change sponsor. It looks at behaviors and activities that make sponsorship more effective and covers the role of the sponsor in helping the organization manage resources. The chapter also offers possible actions to take in light of the situations presented through the vignettes in Chapter 2. The possible actions are broken into two categories: (1) short-term remedies to the challenges that plague or are imposed by weak project sponsorship and (2) long-term fixes that, if applied properly and in context, can serve as a set of preventive measures for the future.

*Chapter 4* is about dealing with stakeholders. It starts by emphasizing the importance of setting and managing stakeholder expectations and it moves into an application of techniques related to forming and maintaining relationships, setting expectations and boundaries, and establishing lines of communication. These areas serve as critical success factors that are a *must* for becoming an effective sponsor. The chapter offers unique and practical insights on how to deal with various stakeholder groups, how to identify and accommodate communication styles and preferences, and how to build a cross-project/cross-initiative collaboration mechanism. On a more tactical note, it explores how to form reporting guidelines, escalations, and thresholds, and helps determine the right level of involvement for the sponsor. Lastly, the chapter offers a discussion on what happens (or should happen) to an initiative if the sponsor changes.

*Chapter 5* covers the unique aspects that change sponsorship introduces. The chapter starts with a mechanism that helps by asking questions concerning the reasons for the change (why), the change vision, and the desired outcome of the change initiative. It then reviews the notion of whether the change brings the organization to a level of sufficient readiness for the next change and proceeds to explore the role of the sponsor in ensuring that changes do not override each other and that people throughout the organization do not suffer from change fatigue. The chapter also provides a discussion having to do with the relationship between

the change sponsor and the change manager, the change agent, and the change subjects (or victims).

*Chapter 6* takes a deeper look into project sponsorship, the project charter, and ways to improve the relationship and collaboration between the project sponsor and the project manager (PM). The chapter covers the notion that sponsors should establish a stronger orientation toward *product* thinking, rather than *project* thinking, allowing success to be meaningful and long-lasting. Product thinking also allows for a more effective lessons learned process that includes a post-implementation review. It then goes through a brief agile discussion that includes the role of the sponsor in agile environments and the sponsor's interactions with key agile team members, including the product owner, the PM (or coach/Scrum Master), the BA (business analyst), and team members. The chapter covers the relationship between the sponsor and the product owner, considerations around the need for a *proxy sponsor*, and the sponsor's interaction with other agile stakeholders.

*Chapter 7* provides key tips and concepts for the effective sponsor, including innovative thoughts around time management, capacity management, prioritization, urgency measurement, and leadership. It then goes through a brief review of a day in a life of the sponsor and continues the critical discussion of effectively working with the PM.

*Chapter 8* revisits some of the key concepts introduced throughout and closes by looking ahead at the future of sponsorship and project/change initiatives. This includes the idea of integrating certain aspects of project and change management and PMO/CMOs (change management offices).

Note that throughout this book, the sponsor is referred to as the “project sponsor,” “change sponsor,” or “initiative sponsor.” In some sections, there will be specific distinctions between the project sponsor and the change sponsor. However, when it comes to change initiatives and to projects, both require similar needs from the sponsor since most change initiatives are broken down into projects.

## IMPORTANT TAKEAWAYS

Addressing the area of change and project sponsorship will help organizations start to fix actual problems, as opposed to addressing just the symptoms and afflictions. The key benefits of this book include:

- Helping sponsors become more effective at both their *day-job* role as well as in their role as sponsors and leaders
- Introducing ideas to help sponsors better understand their (and their teams') capacity and, in turn, prioritize more effectively
- Defining roles and responsibilities and setting realistic expectations
- Enhancing cross-project and cross-initiative collaboration to reduce, or even remove, silos

- Learning how to recognize common challenges that impact sponsorship and performance
- Identifying root causes and underlying trends that lead to challenging situations
- Improving the ability to effectively gather and apply lessons as part of continuous improvement
- Incorporating post-implementation reviews to evaluate an initiative's success level in comparison with the initial intent, business case, and selection criteria
- Ensuring the sponsor picks the best PM and that they act as a cohesive unit (*one entity*)
- Learning how to establish and communicate a clear, inspiring, and measurable vision for initiatives and, in turn, the ability to *extend* the vision to a clear definition of success
- Managing communication and stakeholder expectations to improve stakeholder and team member alignment with the initiative's objectives
- Establishing mechanisms to provide real-time support to team members, while reducing redundancies in guidance, communication, and clarifications

This long list of improvements is achievable and has been proven to enhance performance in multiple organizations. The keys to success are to approach it consistently, avoid taking shortcuts, and ensure that it is initiated from—and supported by—senior management.



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# FOREWORD

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Over the past decade, I have become very interested in how projects can help organizations deliver their strategy. What I have seen is that most organizations do a good job of *creating* their strategy, but *implementing* it is another question. Many organizations struggle to implement their strategy; some with disastrous results. Why is this?

In today's world, every organization is challenged by technology disrupters, new business models, and diversity. Firms are facing competition from not only organizations around the corner, but from all over the world. The creation of the world wide web in the early 1990s opened up a whole new way for organizations to communicate with customers. Suddenly, an organization could sell to customers across the globe. The internet is just one example of new technologies that are being introduced constantly and, in many cases, feature new business models as well. These new technologies are disrupting the way organizations do business and shorten the life of their products. The result is organizations need to change and implement new strategies to take advantage of these changes, to respond to competitors, and to respond to customer needs. However, organizations do not just implement the strategy, organizations must implement their strategy quickly, with laser focus, while reacting to a constantly changing environment.

While doing research for a book I co-authored, *Gen P: New Generation of Product Owners Who Care about Customers*, I found there are several reasons why organizations struggle to implement their strategy. In this book, Ori Schibi addresses two of the reasons: change and sponsorship.

To implement a strategy successfully requires an organization to change. Projects, by their very nature, deliver new products or services. For that product or service to realize benefits, the organization and potentially their customers must change. Two of the keys to successful organizational change is strong leadership and effective communication. For an organization to change, leaders need to be advocates for the change and be able to effectively communicate to staff and customers why the change is necessary and critical for success. How the product is created by the project will help the organization achieve its strategy. Strong leadership shown

by the sponsor of the change is required to overcome the resistance to change of organizational culture and fear of the unknown. If an organization does not change, then the organization will fail.

Projects deliver products that are required by organizations to achieve their strategy. Studies done by the Project Management Institute have shown that two of the most important keys for project success are communication and links to strategy. A key element that links effective communication to strategy is having an effective project sponsor. A project sponsor has two key roles to ensure project success, which Ori addresses in detail in this book. The first role of a project sponsor is to ensure the project is linked to the organization's strategy, and the second is to advocate for the project within the organization and to customers. An effective sponsor must have excellent communication skills to clear project roadblocks, resolve issues, motivate the project team, and support the project manager in ensuring success and strategic implementation.

*Effective Project and Change Sponsorship* explores the role and the skills that a valuable project sponsor must have to ensure successful projects. In today's ever-changing world, a world with increased competition and technology disruptors, every project needs an effective project sponsor. I recommend that every project and change sponsor read this book to gain the skills they need to support their teams and, more important, support the implementation of the organization's strategy.

Peter Monkhouse  
Co-founder, NewGenP  
Past Chair, PMI Board of Directors  
Toronto, Canada

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## ABOUT THE AUTHOR

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Ori Schibi, MBA, PMP, PMI-ACP, SMC, CMP, Agile-PM, is president of PM Konnectors, an international consulting practice based in Toronto. With a focus on disciplined agile practices, project management, change management, and organizational agility, PM Konnectors provides a variety of services which delivers tangible value and quick turnaround to their clients. Many large to mid-sized organizations in diverse industries and levels of governments have benefited from their wide range of innovative business solutions.

Mr. Schibi is a thought-leader and subject matter expert in organizational change, agile, and project management. He is the author of *Managing Stakeholder Expectations for Project Success* and co-author of *Effective PM and BA Role Collaboration* and *Agile Business Analysis*. Ori is also a speaker and consultant with over 25 years of proven experience in driving value creation, improving organizational agility, and effectively dealing with complex programs to stabilize business, create growth and value, and lead sustainable change.









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Downloads for *Effective Project and Change Sponsorship: Getting the Most from Your Strategic Investments* include an initial impact audit and tools for stakeholder analysis, among other valuable documents.



# 1

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## INTRODUCTION TO SPONSORSHIP

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### WHAT IS SPONSORSHIP?

Before diving into the challenges surrounding the role of project and change sponsorship, let's take a quick look at the basics of what sponsorship is all about.

All projects and change initiatives should have a sponsor, who *owns* the initiative and oversees it—often this person is the initiator and the one who introduces it. The sponsor is also viewed as a representative of the customer for whom the project or initiative is being undertaken. When referring to projects, the sponsor is typically expected to secure funding and resources, define the success criteria, approve changes, and make decisions. It is expected that the sponsor will promote the initiative and ensure that it gets the right amount of focus, attention, and priority from the organization because the initiative needs to compete for limited resources with other initiatives and priorities. The sponsor should be accountable for actions, performance, and results since the buck stops with the sponsor—he/she will have to shoulder the blame for unsatisfactory results.

In most cases, sponsors are members of the management layer of the organization, though their seniority varies based on the organizational structure, the circumstances, along with the size, profile, and importance of the initiatives they oversee. The sponsor may be a member of senior management—or even an executive. Project sponsor and change sponsor are rarely titles that are found in organizations since these are roles that are performed by the managers who end up sponsoring the initiatives. In most cases, the person who acts as a sponsor has a day job, and the role of a sponsor has to be performed in addition to the regular or ongoing job of that individual.

In the context of sports, the word sponsorship refers to providing a brand sponsorship to a team or an individual, while in other settings, sponsoring is about providing funding. It is believed that it was brought into organizations suggesting ownership; corporate accountability; and support of an activity, a project, an

initiative, or a result—usually by the sponsor tapping into his/her budget to provide the funding. Either way, it is also common to view the sponsor as a person who puts his/her name to something, as in putting their reputation on the line.

A project sponsor is an individual in the organization who represents the customer; has seniority, authority, and clout; and who justifies and enables a project/initiative to take place. It is important to note that the sponsor can also be an internal organization, a committee, or a team of individuals. The sponsor oversees the initiative and maintains a two-way accountability—coming from the organization toward the project/initiative and by the project toward the organization. The accountability ensures a successful delivery of the initiative toward the corporate goals and enables the initiative to move forward through the allocation of funding, resources, and priorities.

With the exception of small organizations where the sponsor may also be the project manager (PM) or the change manager, the sponsor typically should not be the same person who acts as a PM or a change manager because the roles are different. Although these two roles work together on the same initiatives, they are performed at different capacities and they serve different purposes. Table 1.1 provides a high-level comparison between the role of the sponsor and that of the project or the change manager.

Since the sponsor is a member of senior levels of the organization, the project/change initiatives he/she oversees are typically tactical elements that support a strategic direction or initiative. In many cases, projects are components of an organizational change; whether referred to as a project or a change, the sponsored initiatives are part of a bigger picture within the organization. For example, there may be a technology implementation to automate a process or eliminate the use of paper as part of a modernization initiative, or there could be a reorganization as part of a merger.

Here are some additional roles and expectations that a sponsor must fulfill:

- Represent the initiative at the senior management level to ensure funding, support, and bandwidth
- Support the communication process of the project/initiative (for escalation or for certain communications—for example, with more senior stakeholders)

**Table 1.1** Sponsor versus project and change managers

	Sponsor	Project or Change Manager
Day-to-day management of the work	No	Yes
Funding	Approving	Requesting and managing
Deliverables	Accepting	Producing
Mandates and thresholds	Defining	Working within

- Provide advice and make decisions (specifically when it is beyond the project/change manager's authority)
- Contribute to, or write, the project charter
- Articulate the project/change manager's level of authority, as well as set boundaries between the sponsor and the respective roles
- Be there to support the project/change manager
- Review and approve artifacts, as required
- Serve as an escalation point for decisions, exceptions, changes, and problems
- Maintain an overview of the initiative, without being involved in the details
- Ensure the initiative gets the funding, resources, and attention it needs
- Make sure the project/change manager is aware of any organizational or external factors as well as changes to the product/mandate/needs that may impact the initiative
- Accept or reject deliverables and provide feedback and guidance

As a leader and a mentor, the sponsor should act as a filter to protect the initiative; a motivator for the project/change manager; and a seller of the initiative outward, throughout the organization, and with the customer. It is important that the sponsor provides the project/change manager with context that helps reveal the rationale behind actions and decisions. The sponsor is not there to sugarcoat the information in an effort to make their project/change manager feel better, but rather he/she should act as a partner, despite the hierarchy and the reporting lines.

Understanding what the role of the sponsor entails is not difficult, but the majority of sponsors struggle to fulfill this role as intended. While there is a variety of reasons as to why the role of the sponsor is not performed as expected, the challenges are commonly driven by a lack of awareness of the importance of the role, poor definition of the role, and a lack of time since the day job of the individual who acts as a sponsor consumes more time than expected. The result is that the capacity allocated to sponsoring an initiative is limited and often not sufficient to the project/change needs.

## CHALLENGES WITH THE ROLE OF THE SPONSOR AND THE SYMPTOMS OF THESE CHALLENGES

Every role in any organization faces challenges in the way it is defined and performed; some challenges are technical, and are related to the work itself, while others are related to communication and interactions with others. It is common that the challenges pertaining to a specific role or profession are addressed within their respective areas—by associations and through job descriptions and role definitions, or other guidelines and best practices (e.g., project management, business analysis, change management, accounting, or human resources). With sponsorship, however, it is different since sponsorship is not recognized as a distinct role or as a profession. Sponsorship is often a *side role* for managers—one that comes

in addition to one's official title—and there is little guidance or direction to help perform this role effectively or even define it in a consistent manner.

For the most part, sponsorship is referred to in the context of projects. Most information about this role refers to it in the context of project management—and mostly from the PM's point of view. Further, there are multiple associations that oversee their respective professions—for example, the Project Management Institute (PMI), the International Institute for Business Analysis, Prosci for Change Management, and the Human Resources Professional Association—but there is no Sponsorship Management Institute to define and guide the role of the sponsor.

What this book tries to do is to solve a problem with the role of the sponsor, and when trying to systematically solve a problem, there is a need to conduct an analysis and break down the problem before trying to provide a solution. The way to systematically approach problem-solving includes the following:

1. *Identify the root cause of the problem*—where it comes from and what underlying factors contribute to the problem or lead to it
2. *Recognize the symptoms of the problem*—how it appears, in other words, what is seen and heard as signs of the problem
3. *Look at challenges*—the things that sponsors face
4. *Learn about the impact of the problem*—what it causes throughout the organization
5. *Search for a fix*—it might be a short-term fix to minimize the damage and find a remedy
6. *Explore a long-term solution*—one that changes course in the long run, most likely by circling back to address the root cause(s) of the problem; this is also the main ingredient in being proactive and preventing a problem from occurring, or rather reoccurring, in the future

This chapter focuses on the challenges with sponsorship, the symptoms of these challenges, and the impact that these challenges have on an organization's bottom line—opening up the discussion for subsequent chapters to tackle root causes and solutions.

When referring to challenges with the role of the sponsor, keep in mind that the impact is far-reaching throughout the organization (and at times, beyond—thereby impacting the customer), and it may have significant (and often negative) impact on an organization's performance and bottom line. Although, for the most part, the roles and characteristics of project and change sponsors can be paired up—the discussion here about the challenges is broken down into project sponsorship and change sponsorship challenges.

After looking at the common challenges that project and change sponsors face, those challenges need to be sorted into respective categories of project and change initiatives. These categories help break down the challenges by type and by life-cycle phase.

## Common Challenges with Project Sponsorship

Table 1.2 reviews common challenges surrounding project sponsorship, along with a short explanation for each challenge and, depending on the initiative, these challenges may also be applicable to change-related projects. Project-related challenges for sponsors include a lack of definition of the actual role of the sponsor, a lack of awareness about the importance of the sponsor's role, a lack of coordination between the sponsor and the PM, and a failure to understand the organization's capacity to take on the initiative. Then the common challenges should be discussed by project phase and category.

For projects, there are six categories for sponsorship challenges: one is organizational change and governance, and the remaining five are aligned with PMI's five process groups:

**Table 1.2** Common challenges with project sponsorship

<b>Project Sponsorship Challenge</b>	<b>What It Means</b>
No clear role definition	Sponsorship is often a side job that pairs with other managerial responsibilities in the organization and, as such, there is little understanding as to what it really means to be a sponsor. It is basically up to the individual who acts as a sponsor. There is also no clear definition of the boundaries between the sponsor and the PM—leading to coordination issues, gaps, and overlapping efforts (i.e., redundancies).
No job description/unclear mandate for the sponsor	Sponsorship is not a title and therefore it does not have a job description associated with it.
Lack of awareness around the importance of sponsorship	Senior stakeholders in organizations often tend to think that sponsorship is a hands-off item and that whoever is appointed or installed as a sponsor will perform their role effectively and as expected. There is no training on what to do or how to do it effectively.
Lack of time/capacity	(Almost) everyone is overworked, and this includes sponsors. Sponsors have no time or capacity to perform their role and dedicate sufficient effort toward overseeing their respective projects. Sponsors also lack visibility into whether the performing organizations, or the teams, have the capacity to take on initiatives.
Poor resource planning	The sponsor's primary role is to secure funding and resources for projects, but in reality, sponsors rarely provide sufficient support for their project when it comes to resource allocation. Resource availability is one of the main causes of project failures.

Many challenges with project sponsorship have a lot to do with a lack of sufficient focus and clarity on the role of the sponsor by the organization.

- 1. *Organizational change and governance*—anything that is related to the project management organization, including the impact of the organization on the project, reporting, escalations, governance, the decision-making process, culture, leadership, and the link between the project and the higher-level organizational objectives and strategy. The sponsor is the one who *owns* the initiative and he/she either sets up or articulates the reporting, governance, and structure of the engagement. Table 1.3 provides a look at a few common challenges that fall under this category.
- 2. *Pre-project, business case, initiation, and start-up*—anything that is leading to or at the start of the project, including the process of realizing and identifying needs, opportunities, and problems that need to be addressed; selecting projects; kickstarting and initiating projects; as well as setting up a solid and clear foundation. Some of the things under this category are addressed outright prior to the establishment of the project organization and is done by someone in the organization, while other things need to take place as part of initiating the setting up of the project. The fact that these activities are performed by different organizations within the

**Table 1.3** Common challenges associated with the organizational governance and change category

	Organizational Governance and Change
a.	Executive leadership is not involved or engaged in understanding capacity, priorities, or urgencies.
b.	Ideas, needs, problems, and initiatives are all stand-alone categories and are reviewed and discussed as silos.
c.	There is little to no cross-project coordination.
d.	Sponsors do not have a clear understanding of the direction of cross-project priorities. Projects keep getting pushed out to allow other initiatives across the organization to move forward. This applies significant pressure on PMs.
e.	Too much red tape blocks the sponsor from providing timely and effective support to the PMs.
f.	Project sponsorship is inconsistent and depends on the individual sponsor. There is no global or consistent overview of all sponsorship activities, best practices, or ways to assess sponsor effectiveness.
g.	Deadlines keep shifting with a few projects peaking around the same time, creating fierce competition for resources.

In many organizations, sponsorship is almost taken for granted. There is little guidance as to the role of the sponsor and, correspondingly, limited focus on the performance of the individual who fills the role of the sponsor. There is an expectation of project performance and the sponsor is also expected to deliver on their *day job*, which is typically part of senior management. Unfortunately, the sponsor’s capacity as a sponsor is often overlooked.



organization may introduce challenges around handoff, alignment, and coordination. Further, many of these activities are less structured or do not produce tangible deliverables—therefore they may not end up being performed properly or to a sufficient extent. Nevertheless, this is the time where the foundation and the health of the upcoming projects are set and determined. Since in most cases there is no PM yet in place, most of the responsibilities under this category fall under the sponsor's role, with one specific and important deliverable—producing a clear mandate for the project. Table 1.4 lists common challenges associated with the events throughout the time frames.

**Table 1.4** Common challenges associated with the pre-project and initiation stages

	<b>Pre-project, Business Case, and Initiation</b>
a.	There is little to no process in place to circle back at the end of or even after the project to check the original intent behind it. This could provide an important insight into the project selection process.
b.	The project charter is generally viewed as a chore, and PMs focus on filling out the sections instead of benefiting from the information that is associated with this important document. Sponsors often do not get involved (or sufficiently involved) in the charter process (many times the sponsor is to blame for not providing sufficient support for this process).
c.	Information in the charter is sometimes obtained arbitrarily and unrealistic assumptions are made with no documentation of a validation process.
d.	The sponsor's role in the various stages within this category is often not clearly defined.
e.	Feasibility analysis is often not done properly, if at all. PMs know how to do this, but do not know if they have the capacity to handle it right now.
f.	The vision of the initiatives is often not clear and hard to articulate; most people are not even aware of it. Further, success criteria for projects are not clear, not articulated, and contain gaps.
g.	Sponsors are having a hard time building trust and rapport and with establishing rules of engagement with the PM.
h.	There is insufficient effort to identify and analyze stakeholders and to align objectives with stakeholders' needs.
i.	It is hard to find a common thread or proper continuity from the pre-project and the business case stage to the project.

Many organizations suffer from various levels of disconnect between the business case and the project once it is formally initiated. This limits the sponsor's and the PM's ability to align needs and objectives and to articulate a clear mandate. Further, project initiation activities are often not clearly defined and since many of these activities are nontangible, it is hard to find time to perform them properly.

- 3. *Planning*—a lot has been said about planning and how important planning is. It is necessary to create project plans and employ the components of a good plan. Planning is primarily the role of the PM, although an important part of the mandate and the tone about the planning process comes from the sponsor. In most cases, however, it is impossible to know the exact mix of things or responsibilities that make a plan a good one under a specific context. Further, it is also important to note that planning is virtually never considered fun or desired and there is typically a significant push to move forward from the planning stage to actually start *doing* something. Unfortunately, there are many things that can go wrong with planning. It is possible to end up with: a good plan for the wrong thing, an ineffective plan, a rushed plan that misses key information, a plan that is too detailed, an incomplete plan, an unrealistic plan, or a plan that is based on the wrong assumption. Table 1.5 provides insight into common areas that may lead to problems during this stage of the project.
- 4. *Throughout the project*—this stage is commonly referred to as implementation and execution. From the role of the PM, the intent is to ensure that work is getting done, as well as to enable team members to perform their work by handling issues, risks, and challenges as they emerge or preventing

**Table 1.5** Common challenges associated with project planning

	Project Planning
a.	Of all the project constraints, resources (human and other) are, for the most part, the most overlooked and <i>volatile</i> element. The PM needs the sponsor to mandate and provide support regarding resource planning and utilization. In many project environments, this area becomes a major source of problems.
b.	A lack of cross-project planning and prioritization leads to difficulties for functional area managers in matching resources to project needs. PMs almost systematically complain that they either do not get enough of the resources they need (skills and experience), they are not on time, or they are not available for the right duration.
c.	Sponsors and PMs interfere with the team’s functionality and estimating process.
d.	Customers cannot seem to lock down their actual requirements and there is pressure on the PM to move forward with unclear requirements.
e.	Stakeholders (and various teams) claim that they are brought to the table too late.
f.	It is unclear which decisions the sponsor is in charge of and which the PM can handle (including risks).
g.	Sponsors lack the ability to determine <i>whether/to what extent</i> the plans are realistic.

Although the planning process is led by the PM, it is important for the sponsor to provide an effective mandate for the planning process. In addition, the sponsor needs to oversee and support the planning process and its result. Unfortunately, many sponsors apply undue pressure on teams during the planning process to compress estimates.

them beforehand. The sponsor here is not hands-off and he/she needs to keep an eye on performance, on issues, and on the thresholds—both through the *lenses* of the PM, as well as independently. There are typically a lot of moving parts and many things can go wrong. It is possible to misunderstand actions or results and perhaps take things out of context. Table 1.6 lists some challenges that typically take place during the project execution and implementation phase.

5. *Project controls and reporting*—this stage is not a stand-alone time frame, but rather it happens in parallel to the planning and the implementation stages, following the Deming cycle<sup>1</sup> of plan-do-check-act. The PM leads the effort of checking performance, reporting, adjusting, and handling changes, while ensuring that everyone is on track, aligned with the needs, and continuing to produce and realize value for the stakeholders. The PM has the authority to work within the mandate given by the sponsor, and here too, a lot can be misunderstood and reports may not properly reflect the actual performance. Also, it is the role of the sponsor to make decisions that are outside of the scope, mandate, or authority of the PMs regarding project events, deliverables, risk changes, and other things that require signoff. Table 1.7 provides a look into common challenges during this part of the project.

**Table 1.6** Common challenges that take place throughout the project

	Throughout the Project
a.	Competing priorities and initiatives in the organization impede the sponsor's ability to support the project and the PMs.
b.	There is lack of user support or involvement because the client does not understand the importance of involving users.
c.	PMs focus on the critical path and are constantly pushing out non-critical-path activities. It makes the projects look as if they are on schedule until there is no more room to push non-critical-path activities out.
d.	Everyone in and around the project is consistently overallocated and pressed for time, compromising the ability to make informed decisions.
e.	There is widespread confusion about accounting for time contingencies, where on the schedule to place them, or how to account for them.
f.	Project resources are spread too thin, leading to stress, communication breakdowns, conflict, confusion, lack of attention to detail, lack of focus on risks and problems, rushed estimates, and quality problems.
g.	Sponsors are often spread too thin, failing to be sufficiently available for their projects' needs.

When project work is taking place, there is an ongoing need to provide oversight and support for the PM and the team. Sponsors should not allow projects to move forward “hands free.” They need to be present beyond the needs around reporting and escalations.

**Table 1.7** Common challenges through monitoring, controlling, and reporting

	Project Monitoring, Controlling, and Reporting
a.	Projects report status regularly and appear to be in good shape until later in the project (i.e., about the 70% point) when problems start to surface.
b.	The information that sponsors get is solely based on what PMs tell them.
c.	The PM does not know what information to give the sponsor and the sponsor keeps overstepping boundaries with the PM.
d.	Sponsors sit in on too many project meetings. They are not sure why they are there and it is consuming their schedules.
e.	Changes are assessed inconsistently and in silos. No full impact is assessed—especially when the change impact is compounded by other changes. Change estimates are based on best-case scenarios and change-related risks are overlooked.
f.	Escalation procedures are loose, unclear, and not followed. When there is a problem, no one knows who to go to and confusion ensues.
g.	Status reports and their meanings are often open for interpretation—depending on the PM’s <i>flavor</i> . The inconsistency makes it hard to compare projects in an apples-to-apples manner.

Monitoring and controlling do not represent a distinct time frame, but rather these activities, along with reporting, take place throughout the project during execution and implementation. The controlling and reporting activities are critical in gaining an understanding of the project status and ensuring that it is under control.

- 6. *End of project and post project*—this category spans over the late stages of the project and into the post project. The role of the sponsor is not to perform the closing activities, but to provide the signoffs and acceptance that lead to the closure, as well as oversee many elements of the closing process. The PM and the team will perform most of the project closure work, but things like acceptance, payments, contracts, resource releases, and hand-offs need to be overseen or at least approved by the sponsor. The lessons learned process is also performed predominantly by the PM, but the sponsor needs to review and accept the findings, along with decision making on the application of the lessons. The part that spans beyond the project life cycle and into the post project involves warranties and potentially some late hand-off aspects, along with the option for post-implementation review (PIR). Unlike the lessons learned process, which focuses predominantly on team performance and processes, the PIR is about product delivery and will typically be performed around three to six months after the end of the project, to allow the product’s performance to settle into a routine. While the sponsor is not likely to perform these things, there may no longer be an associated PM or even a cost center to handle these

items. Regardless of who drives these activities, it is the sponsor's mandate that matters most here, especially when it comes to the PIR. The PIR does not need to take place in every project (depending on the nature of the product), but it takes place in significantly fewer instances than it should.

One additional possibility is for the sponsor to look into a more strategic lessons learned process that reviews the project's outcomes and benefits with those stated in the business case and the charter in order to check whether it was a good idea to begin with and whether the right approach was taken. This type of a lessons learned exercise is rare and blurs the line between the project and the change sponsor's role. With that said, it is perhaps the most effective way for organizations to strategically examine their project selection process. Table 1.8 reviews the common challenges associated with these late stages of the project life cycle.

In later chapters we cover what is expected of the sponsor in any of these life-cycle phases by reviewing what the sponsor should look for, measure, ask about, or do in any of these stages. While the sponsor's role is to oversee the project, protect the project and the team, promote the project, and serve as an accountable decision maker and escalation point, each life-cycle phase requires different areas of focus, things to measure, and characteristics.

**Table 1.8** Common challenges with the end of the project and post project

	End of Project and Post Project
a.	Projects and products are successful, but it is occasionally due to people pulling superhuman acts and saving the day. This is not a sustainable way to operate.
b.	Project benefits that are under consideration are mostly tangible and financial. Other benefits are overlooked.
c.	There is no mechanism to measure benefits beyond project completion.
d.	As projects reach their end, sponsors are unsure of the appropriate time to bow out.
e.	PMs focus on a project's considerations within its life cycle with little regard to post project benefits or impact.
f.	The lessons learned process does not provide sufficient or meaningful lessons for the organization.
g.	No PIR takes place.
h.	The lessons learned are mostly tactical and do not provide insight into project selection or approach.

There are fewer challenges with the end of project and post-project category as there are fewer activities associated with these stages. However, beyond the administrative chores that take place at the end of the project, most of the challenges are associated with identifying the lessons learned from the project, the degree of success achieved, and the benefits associated with the product.

## Common Challenges with Change Sponsorship

Table 1.9 provides an overview of common challenges associated with change initiatives. These include the failure to create a clear and compelling vision, the failure to frame the scope of the change, and the failure to manage the transition. Similar to the project sponsorship discussion, this is followed with a breakdown of the challenges by change *stage*. Although categorized under *change sponsorship*, these challenges may also impact projects. Table 1.10 provides context for some of the more significant change sponsorship challenges.

For the change categories, the U-Curve has been used, based on the Kübler-Ross 5-Stage Model<sup>2</sup> for change that can be seen in Figure 1.1. It has been tweaked a little—as an *interpretation* of the model—by renaming the five primary stages, as they appear in Figure 1.2.

**Table 1.9** Common challenges with change sponsorship

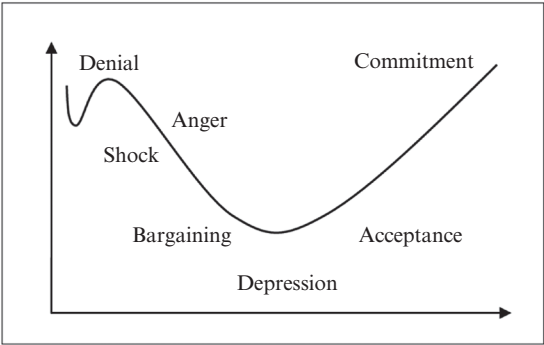
Change Sponsorship Challenges
Failure to define the scope of the change
Failure to set coalitions
Failure to create a sense of urgency
Failure to manage the transition
Failure to finish
Promising an easy, cheap, and quick change
Leaving it up to the PM to lead
Not communicating the reason for the change
Undermining the status quo
Moving at the wrong pace
Treating all those who are involved as one, instead of tailoring the messages
Failing to set clear expectations
Failing to connect with the project(s)
Being reactive
Failing to prioritize
Failing to realize constraints and capacities
Fear of making decisions or taking action
Failing to coordinate within the initiative and across organizational boundaries
Letting exceptions slide and become the norm
Weak leadership
Unclear communication
Allowing political considerations, territories, silos, egos, and emotions to drive decisions
Poor time management

1. *The introduction of the change (where shock ensues)*—this is when the change is announced or introduced, and where the sponsor's focus needs to be on ensuring that there is a clear and compelling vision. For some stakeholders this may come as a surprise, while for others the change could not come soon enough. Some are happy about the change and that it is finally going to take place, while others do not want to change. Once the vision is in place and the message is out, the sponsor needs to start the process of mapping out who might support the change, who might resist, and

**Table 1.10** The meaning of common and significant change sponsorship challenges

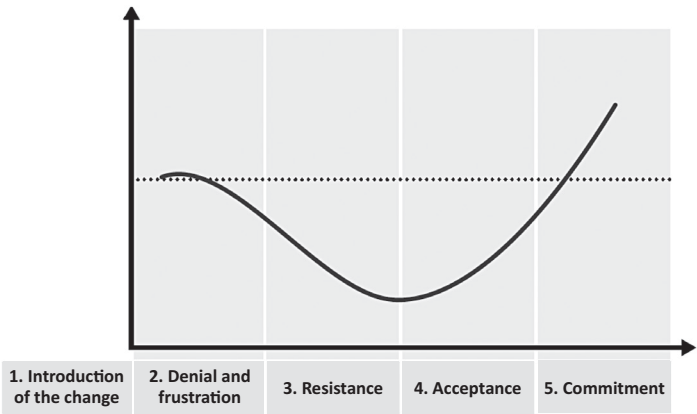
Change Sponsorship Challenge	What It Means
Failure to identify and communicate a compelling vision	The vision of the change is often poorly defined or unclear to most stakeholders who are not at the senior level of the organization. At times, there is no clear vision altogether, which introduces the question of why the change is even taking place. A lack of consistent understanding of the vision also leads to inconsistencies with decision making and with setting the right level of urgency and prioritization.
Failure to frame the scope of the change	We often fail to realize the true magnitude of the change—believing and leading others to believe that the change is going to be smaller, faster, and lower in cost than it actually ends up being. This gap in expectations may lead to performance issues and increase resistance when people realize that benefits are not realized in full, or on time.
Failure to manage the transition	From the time an announcement is made about an upcoming change (unfreezing or ending the current status quo) until we reach the destination (the refreezing or the beginning of the new desired state), there is a transition period. This involves uncertainty, resistance, frustration, changing realities, confusion, and disillusionment. It is paramount to manage the transition by ensuring that expectations are managed and that people feel that the change stakeholders care about them and handle their needs properly and with transparency.
Failure to effectively deal with resistance	During the transition, it is virtually a guarantee that some (or more than some) stakeholders will express resistance. This could be the result of frustration with the pace or the nature of the transition or due to a lack of knowledge about what it takes to handle the change, a lack of information about the change, or a lack of willingness to change. Either way, the handling of the resistance may spell the difference between the success or failure of the initiative—and it is driven by the change sponsor.

While the types of challenges that change and project sponsors face may overlap, there are some unique challenges that change sponsors face when dealing with a change initiative; presented here along with their meanings.



Call it the Kübler-Ross Model, change curve, or the U-Curve—it refers to the stages people go through during the change. Note that the *uptick* at the beginning may take place either because people are happy that the change is finally here and they improve their performance or they try to prove that the current state is fine, so they (temporarily) perform better until they realize that the change is not going away. *Source:* [https://www.researchgate.net/figure/Change-curve-Source-Kuebler-Ross-1969\\_fig1\\_309816280](https://www.researchgate.net/figure/Change-curve-Source-Kuebler-Ross-1969_fig1_309816280)

**Figure 1.1** Kübler-Ross 5-Stage Model



The first stage is the introduction (or announcement) of the change; the second stage is where people realize the status quo is going to be no more; the third stage is where anger and fear trigger resistance; the fourth stage is where exploration is leading to acceptance; and the fifth stage is where we gain commitment and rebuilding—toward the next change.

**Figure 1.2** Interpretation of the U-Curve



who is unsure or noncommittal. This is the first step in drafting a road-map and the start of what will be an action plan on how to go through the change, at what pace, and what needs to take place at any point. Figure 1.3 provides an overview of the challenges that take place in the introduction of the change stage.

2. *Denial and frustration (early stages of the change, sliding down the U-Curve)*—this is when some stakeholders do not accept that the change is moving forward, while others do not like the direction or the pace of the change. This stage is characterized by stakeholders who *hear and see* different things about the change; there are growing gaps in expectations and misunderstandings about the change and its impact. The sponsor needs to focus on creating alignment and maximizing communication, and if this stage is not handled well, some stakeholders may be lost in the process and the sponsor may never regain their support or trust. Depending on the extent of the dip that stakeholders go through, they may later check out or even leave the organization. Figure 1.4 provides an overview of the challenges that take place during the second stage of the change—the denial stage.

Leadership	Communication	Planning	Vision
Absence of leadership consensus	Insufficient communication planning	insufficient, unrealistic, optimistic planning	Lack of clear, compelling, or communicated vision
Lack of accountability	Promising a quick, cheap, pain-free transition	No proper resource needs identification	Disconnected/unrealistic vision
Failing to establish a sense of urgency	Failing to assign ownership of the pieces	No planning for resistance	No defined outcomes
Assuming people will simply enroll in the change	Lack of organizational agility	Failing to realize the challenges of the transition	Failing to realize the extent of interlocking with other initiatives
Failing to recognize or address paradigms	Not establishing clear communication ownership and escalation lines	Disconnect between the change initiative and the project	Failing to frame the change scope
	Making the announcement without following up or continuity	Poor risk planning (i.e., tactical, optimistic)	Failing to realize it will be a sail, rather than a straight line toward the vision
		Failing to properly identify, manage, or communicate assumptions	

Breaking down the challenges during the first stage of the change—the introduction of the change—into four main categories: challenges with leadership, communication, planning, and vision.

**Figure 1.3** Common challenges during the introduction of the change

Leadership	Communication	Resistance
Failure to maintain focus on the vision	Missing or unclear feedback	Attempting to suppress resistance instead of honoring it
Disjointed team	Unrealistic expectations and mismanaged	Reactiveness as a result of a lack of planning for resistance and side effects
Failure to measure and show progress	Insufficient communication leading to rumors and frustration	One size fits all—mishandling those that are unaware, unable, or unwilling
Panic: trying to force the change (too strong, too fast)	Engaging in meaningless forms of communication	Over-focus on dealing with resisters
Failure to articulate the difference between the change and the pain associated with it		

Denial stage challenges are broken into three main categories: challenges with leadership, communication, and resistance handling.

Figure 1.4 Common challenges during the denial stage

- 3. *Resistance (unfreezing of the current state, where depression and experiments are common, essentially at the bottom of the U-Curve, with some movement to the right and eventually slightly upward)*—there may still be gaps in perceptions and expectations and it is normal and expected for some stakeholders to demonstrate resistance. The focus should be on sparking motivation and starting the process of developing capabilities. The sponsor needs to lead the effort and set the tone to handle the resistance effectively, so that more stakeholders will begin the experimentation process toward achieving buy-in. Resistance may show itself in different forms and for various reasons: some want to maintain the status quo while others may not like the direction that the change is moving in, how the change is being executed, or that it is taking too

long or is too painful for them. Some may be concerned about what will happen to their roles or their performance once the change is complete. The sponsor needs to honor the resistance and handle it effectively and efficiently. Chapter 5 deals with change sponsorship in more detail and breaks down the source of the resistance into three primary types: a lack of awareness about the change; a lack of knowledge about what it takes to do the work past the change; and a lack of willingness to change altogether. Figure 1.5 provides a glance into the challenges that are introduced during this stage.

Organizational	Communication	Resistance	Leadership
Lack of resilience	Failing to reinforce the message in different ways	Failing to handle resistance/ignoring it	Focusing on lost battles and on persistent resisters
Focusing on symbols, politics, structure, and appearances—rather than on people and culture	Failing to address different communication needs and styles	Focusing on fighting resistance and on suppressing it, instead of on learning where it comes from	Failing to manage the transition
Failing to address the change saturation/fatigue		Sending a message that it is better to resist	Failing to lead/lead by example
Failing to handle interlocking change initiatives		Caving to resistance: changing course, slowing down, calling things off	Failing to realize what change stage people are at and that different people are in different stages
			Allowing people to check out
			Panicking and allowing panic to ensue
			Focusing on tactical elements and losing sight of the vision

Resistance stage challenges are broken into four main categories: organizational, communication, resistance, and leadership.

**Figure 1.5** Common challenges with the resistance stage

4. *Acceptance (transitioning through the neutral zone and upward by way of more experiments and decisions)*—there is a chance that the change initiative may never make it to this stage if the initiative is not successful or if it is stopped prematurely. However, reaching the stage of acceptance is a sign that things are moving in the right direction and that they are starting to fall into place. Stakeholders start moving up the right side of the U-Curve. The sponsor needs to make sure that expectations are aligned, benefits and value are beginning to be realized, and that the results are starting to *stick* and become second nature, or a new normal. The sponsor should also see that there is further development in capabilities and that knowledge is shared. Figure 1.6 lists the challenges that are introduced during the acceptance stage.

Leadership	Organizational	Vision
Insufficient reinforcement	Failure to check for side effects and organizational impact	Thinking we are done
Failure to engrain the change	Failure to realize that some people have not moved up to this stage	Failure to see the big picture
Failure to think product, rather than project	Failure to communicate achievements	Failure to articulate and show the benefits
Letting go too early	Failure to address anxieties that are triggered by the change	Failure to check progress against the vision and to revisit the original intent
Failure to celebrate success		

Acceptance stage challenges are broken into three main categories: leadership, organizational, and vision.

**Figure 1.6** Common challenges with the acceptance stage

5. *Commitment (integration and refreezing the new state)*—the new or desired state is achieved, and stakeholders are now stabilizing at the top right corner of the curve. It is good to celebrate, but it is more important to ensure that the change sticks and also to check on the results and show the extent to which the goals have been achieved. The new reality is also the new status quo, and it is important to review both the past and the future. For the past: look back at the business case and determine to what extent the objectives were achieved. For the future: assess the new position (status quo), what the upcoming needs are, and whether it is possible to begin the next change. Figure 1.7 discusses challenges that appear at this stage.

Leadership	Organizational	Vision
Failure to emphasize mutual accountability	Rushing into the next initiative prematurely	Lack of understanding of the full extent of what we have just achieved
Focusing on functions instead of on common goals	Failing to establish a plan to reinforce the achievements	Lack of understanding of the new position, needs, and capabilities
Failure to realize that some people have not reached this stage	Lack of preparation for the next change	Failure to understand the true state of the new status quo
	Lack of realization of new capabilities	Failure to end properly and redefine the current state
	Failure to realize lessons, or to apply learning from lessons	Failure to finish
	Failure to realize the full extent of impact on other areas	Failure to accept that the results may not be fully aligned with the original mandate
		Failure to realize <i>economies of scope</i> : originally unintended benefits

Commitment stage challenges are broken into three main categories: leadership, organizational, and vision.

**Figure 1.7** Common challenges with the commitment stage

## THE IMPACT OF CHALLENGES WITH SPONSORSHIP

The impact that challenges with sponsorship have can be highly damaging to organizations. When project sponsors are not effective, it may lead to performance issues with the project, and often to project failure. Depending on the nature of the project, failures can be damaging and expensive. Clearly, not all project failures are because of sponsorship problems, but many failures do originate from poor sponsorship. This may involve an unclear mandate, failure to envision the project and the team, insufficient support, untimely decision making, or flawed decisions. Unclear or unrealistic expectations, optimistic timelines, poor risk management, or issues around project change control can also be associated with poor sponsorship. Following the principles that *fish rot from their heads*—many project problems can be traced back to challenges with project sponsorship.

When it comes to change sponsorship, although the impact of challenges may be even more severe than that of project sponsorship, it is often hard to measure or articulate the full impact that challenges with change sponsorship may introduce. The change sponsor may be referred to or viewed as the change initiator or the change leader—and as such, he/she oversees the change initiative. In a similar fashion to the role of the project sponsor, the change sponsor provides a mandate, sets expectations, and gives a direction. However, the change initiative may include one or more projects, and naturally it may span over a longer time frame.

Either way, when the sponsor (project or change) does not perform his/her role properly, it has a lasting and often significant impact on whatever they oversee.

## THE REASON FOR SPONSORSHIP-RELATED CHALLENGES

A common theme throughout the book is about the need for sponsors to realize the significant, if not critical, impact they have on the success of their areas of responsibility—be it a project, a program, or a change initiative. While many of those who become sponsors are familiar with the type of work they need to perform, relatively few do it effectively and there is a wide range of reasons behind it:

- A lack of awareness regarding the nature of the sponsor's role or the importance of the sponsor to organizational success
- The sponsor's limited ability to integrate multiple factors into a cohesive big picture
- The sponsor's ineffective collaboration with the PM and other stakeholders
- A lack of time since sponsors are typically also senior officers in their respective organizations and usually focus first and foremost on their day jobs, whereas the sponsorship *hat* they wear is secondary

- Poor portfolio management in the organization with unclear capacity management and inconsistent and insufficient prioritization (both across and within projects) causing sponsors to struggle to focus on what matters most
- A lack of organizational agility (i.e., timely and effective handling of the changing circumstances)
- A lack of clear communication protocols, as well as a lack of clear norms and ground rules, which can lead to confusion and misunderstandings
- The failure of sponsors to draw clear *boundaries* between their role and that of the PM, with clear roles and responsibilities
- No adherence to best practices resulting in poor resource management and almost a complete lack of assumption management, which delays the discussion and surfacing of challenges causing a delay in handling these challenges
- Not seeing the big picture; a lack of clear links between project/initiatives and strategic objectives causes frequent and unnecessary changes to priorities and areas of focus, and with that, comes also a lack of focus on risks that are bigger than and span beyond merely project risks

It is clear that most sponsors (as well as other roles within organizations) suffer from a chronic shortage of time and are consistently overworked. This time shortage means a lack of ability to invest sufficient time and capacity in what they do—leading to poor decision making that involves hasty decisions, misinformed actions, and a constant feeling of being overwhelmed by the continuous barrage of issues and challenges that are thrown at people.

Most of the underlying reasons for challenges with sponsorship are about awareness, role definition, and prioritization. These are all familiar areas that can be improved. None of these areas are in the range of *unchartered territory*; yet, it is unclear why people continually struggle to improve on the area of sponsorship.

*Fixing* project and change sponsorship will not magically make all associated problems go away, but it can significantly improve the way project and change success are delivered. In a way, it is safe to associate project and change sponsorship with the 80:20 Pareto Principle:<sup>3</sup> fixing sponsorship can pave the way to substantial improvement in projects and in change initiatives performance.

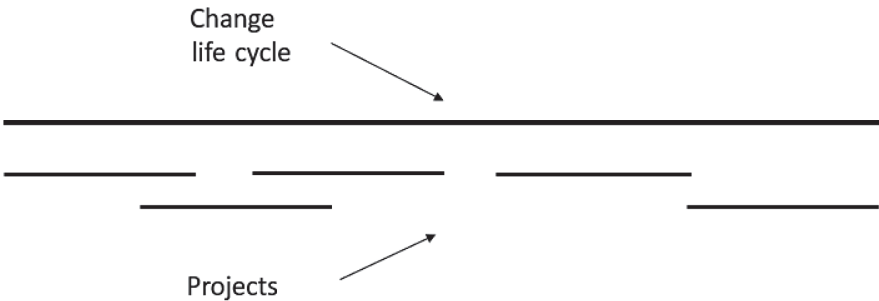
## PROJECT VERSUS CHANGE SPONSORSHIP: SIMILARITIES AND DIFFERENCES BETWEEN THEM

Let's take a look at the key differences between project and change management and at why the role of the sponsor, when it comes to these two areas, is surprisingly similar. Project management and change management are intertwined with each other, and while they are two distinct areas and disciplines, many of the roles of the sponsor in these two disciplines are similar. In both disciplines, the sponsor

initiates, leads, drives, mandates, supports, oversees, articulates success, enables and serves as an escalation point, accepts, and signs off.

It is safe to say that almost all projects introduce an element of change in them. Any product or result that a project produces may lead to a change in the way things gets done in the organization and in the way people do their work. For that, each project needs to have the basic elements of change management, which include the handoff from the project to operations, any transition requirements, training, and communication. Any PM who does their work properly performs some change management elements in their project management work. It is safe to say that project management and change management were combined in the past, before the awareness for distinct change management needs emerged.

With that said, when referring these days to change management, it is different than project management—and change management goes significantly beyond the scope of the project. In fact, the change management life cycle is expected to be longer than that of the project and potentially entails multiple projects within it—as illustrated by Figure 1.8. Therefore, change management involves a larger initiative, possibly of a more strategic nature, that transitions, moves, or transforms the organization or parts of it into something else. A change initiative may include multiple projects and, as a result, one could ask what the difference is between change and a program. After all, a program is a group of related projects that are managed in a coordinated way. The main difference is that programs, like projects, are tactical and the change may have a more strategic impact. The comparison between change and a program also brings us back to the comparison between the roles of the sponsors and the many similarities between the change sponsor and the project sponsor.



The change life cycle is longer than that of a project and may include multiple projects within it. Changes are different than programs.

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**Figure 1.8** Project and change life cycles



Although project and change management are considered different disciplines, it is important to see how these two areas get closer to each other and perhaps start to converge into one, as they are both intertwined.

## Connecting Change and Project

It is nothing short of critical for organizations to ensure that there is a connection between change and projects. Now that it has been established that change is typically bigger than projects, it is through project management that organizations manage to do things, make changes, implement solutions, and deliver on their objectives. It is therefore important to articulate the needs and success criteria of the change initiative, which is often of a strategic nature, to define and measure what needs to get done in order to fulfill the change and deliver on its vision.

With no proper coordination and connection between change and projects, great ideas might end up failing, and projects may deliver on budget and on time but not deliver value. Chapter 5 further discusses change management and the need to ensure proper connection to project management, including considerations such as the charter, risk management, definition of success, and communication.

## Change and Project Sponsor

When it comes to change and projects—there is often confusion, as many organizations “install” a change manager to work alongside the PM. If these two individuals do not coordinate their roles and responsibilities with each other, it may lead to confusion regarding who is in charge of what, the touchpoints between the two roles, and where one role’s scope ends and the other’s begins.

The mix of change and project management roles is also confusing at the sponsorship level. If there is both a project sponsor and a change sponsor, it is hard to distinguish who is in charge of what, and it introduces confusion when it comes to separating the product development (i.e., project) from the impact that the same will have on the organization (change management). When these two roles are separate, it may also lead to turf wars, as part of the too widespread siloed thinking.

Although change and project sponsors look at different areas within the organization, have different impacts, and explore different considerations, their roles are similar. That is the thought behind this book: to introduce more knowledge, context, and understanding of how to become a more effective sponsor—change or project. Table 1.11 provides a high-level comparison between project and change sponsorship and their respective roles; showing that many of the roles and the responsibilities of the two positions are similar to each other.

**Table 1.11**    Project and change sponsorship

Project Sponsorship	Change Sponsorship
Charter the project and articulate the business case	Be visionary, build a coalition
Promotion, authorization, scoping, funding, and resourcing	Manage, combat, and handle resistance and attitudes
Promote this project and provide prioritization within/across/against other projects	Prioritize the projects within the initiative
Ensure alignment to strategic objectives	Create alignment to strategic objectives
Benefit realization beyond the project	Ensure sustainable change (the change is sticking and is coordinated with organizational needs)
Represent the user of the project's product	Represent the organization's needs that may include products and other elements
Set priorities within and across the project/initiative	
Advocate for assigning the right resources	
Ensure funding/budget is in place	
Set goals and success criteria	
Approve; serve as an escalation point and sign off	
Check completion of key deliverables and milestones	
Protect the initiative and the team	
Engage other stakeholders	
Lead certain communications	
Promote the needs of the initiative	
Be visible and sufficiently involved	
Be proactive about the role	
Gatekeeper	
Leader	

There are many similarities between the roles of the project and change sponsor.

## Project Management

Projects are tactical by nature; they serve as a means for organizations to introduce new products, services, or results, as part of the effort to grow, improve processes, expand, or achieve strategic goals. As tactical processes, projects are not unimportant, but rather they deal with day-to-day activities toward their defined objectives. Typically, the main focus of projects has been on goals, performance, tasks, and

results, in the context of introducing a new product, capability, or process. As a result, PMs are installed to lead projects, with a heavy focus on performance, benefit realization, and capabilities. Unfortunately, the focus on performance has tilted organizations away from managing capacities and effectively handling the human aspect, along with understanding the full range of impact that the project's result will have on the organization and its customers.

Project management has gone through major growth in the past quarter century, since around the time PMI first introduced *A Guide to the Project Management Body of Knowledge (PMBOK® Guide)* in 1996. This practice contributed to the significant increase in awareness around the importance of project management, along with a spike in learning and professional development. Through the years, hundreds of thousands of practitioners have obtained certificates and organizations have pursued alignment with the PMBOK's principles and practices.

## Change Management

Change management is not a new discipline, but rather a newly realized element that is a key factor for performance and success. Change is an integral part of every organization and is about understanding the impact that the project's product will have on the organization, its customers, and its users. Further, while projects typically introduce products and measurable results, change is about managing the attitudes of people and, as a result, of the new reality that the change introduces. Change can come in multiple forms, but overall, it is about how people will respond to new or different things and how to minimize the negative impact of these responses, including side effects, resistance, and getting out of the comfort zone.

There are a few truths about change: it tends to be longer, more expensive, and bigger than it is initially thought to be. Also, although it is called organizational change, organizations do not change, but people do—and the main components, drivers, and keys to success in organizations are *people*. It is Dofasco<sup>4</sup> that since 1970 has used the same corporate slogan: “Our product is steel. Our strength is people.”

It is safe to say that change is typically *bigger* than projects. That is, an organizational change may be comprised of more than one project, and it will take longer to commit to the new reality that projects introduce than to implement the project's product. This brings us back to the sponsorship element; a project sponsor is someone who oversees a project, owns it, funds it, and who, most likely, is in charge of defining the objectives and success criteria. In most environments, project sponsors are senior stakeholders in the organization who have a day job within the organization, and in addition, they oversee the project, commonly as part of a portfolio of projects under their umbrella.

Then what, or rather, who is a change sponsor? The change sponsor may be a program sponsor who oversees a group of related projects or initiatives. Alternately, the change sponsor may oversee the areas of accepting, committing, and adapting to a new reality that is introduced in the organization. The sponsor needs to ensure that it is not only the product that is delivered, but that there is also a plan to ensure that the new way of doing things is accepted, is handled effectively, and is in the context of the organizational needs. Change sponsors are senior stakeholders who look at the people, attitudes, and the organizational impact of the change. Either way, the role of the change sponsor is similar to that of the project sponsor—and the two are often related. Further, the two roles may be performed by the same individual.

## Additional Sponsorship Interactions

### *Agile*

Although many would not agree, agile is an *extension* of project management since it offers a different way to slice the project life cycle and it introduces practices that serve to reduce risk, effectively handle change, and introduce efficiencies. Since the time agile was coined in the context that it is currently known (2001), it has taken a few years to grow and gain significant traction. Around 2010 agile started to take over as a new methodology, offering a new promise to improve project performance. In the process, Scrum has become a household name and multiple organizations have attempted to pursue capabilities in managing agile projects; in many cases, stating that they intend to replace traditional project management approaches with agile.

Unfortunately, although agile is based on very effective concepts, for the most part, agile has not managed to bring with it the full extent of the desired benefits that proponents thought it would. A leading reason that many organizations have fallen short of fully realizing the potential of agile has been due to applying the agile concepts the wrong way, in the wrong context, or for the wrong reason. Another common challenge in agile environments is no other than sponsorship because there is often confusion between the role of the project sponsor or the executive sponsor and that of the product owner. The latter is intended by agile methods to act as a hands-on sponsor, to call the shots, and accept and make decisions. It is common, however, for an organization to *layer up* the role of the sponsor with that of the product owner, introducing a lack of clarity, duplication of effort, confusion, and ultimately friction between the two roles.

The product owner is a distinct agile role who, with the lack of a better term, serves as *the single wringable neck* in a project. He/she sets and defines objectives,

articulates success criteria, calls the shots, accepts deliverables, and determines what will happen next (if anything) and what will change.

In addition to the seams between the sponsor and the product owner, in some agile environments, the business analyst (BA) may also be the *acting* product owner when there is no individual to fulfill the product owner role or when the product owner is not sufficiently available or involved. This introduces more challenges to the project's success due to the BA's lack of context and seniority to perform the product owner's role effectively. Having the BA support the product owner can be very helpful, but having the BA outright replace the product owner often backfires.

Around 2014, Gartner introduced the *bimodal approach* that called for an organization to maintain two types of operating systems for managing projects—maintaining abilities in traditional or *waterfall* approaches, while also developing agile capabilities. From this book's perspective, this approach further reinforces the need for an effective sponsor, whatever the life-cycle approach may be.

### ***Sponsorship and Effective Management***

Another aspect of sponsorship that this book covers is the need to develop the ability to become an effective manager. Since most project and change sponsors also serve in different capacities in their organizations (e.g., senior managers, directors, division heads, or executives), it is critical that they develop the right skills and awareness of how to become effective managers and leaders, beyond their product and organizational knowledge, along with the ability to foster, coach, and support their direct reports toward becoming effective managers. These items include the ability to actually manage people (i.e., their teams), as opposed to only managing performance and objectives.

### ***The PMO and Governance***

Sponsorship, like any other function in an organization, cannot be performed in a silo and it must understand its place in relation to other parts of the organization—especially when it comes to bodies that work closely together or those that may impact the ability to deliver success.

Project management offices (PMOs) have had an important role in supporting projects, but when the PMO's involvement is not right (i.e., too much or too little), it may be detrimental to project success. Regardless of the type and mandate of the PMO, the sponsor needs to establish rules of engagement with it so that both sides know their respective and their counterparts' level of involvement, timing, decision-making authority, and all of the associated touchpoints.

It is also important to engage project and organizational governance to ensure understanding of their structure and process. It is necessary to learn how the project/change initiative can benefit from the governance structure and best

practices, as well as what vital information to be aware of, or anything that may pose constraints and risks on what is being done. Governance is key in ensuring accountability and process adherence, and it provides transparency and proof to stakeholders of that transparency and final product value. Governance processes cannot be ignored, and it is wrong to think that bypassing these processes will help initiatives in the long run. Therefore, it is necessary to accept, embrace, and work with the governance structure that is in place. When there is a need for a change, the sponsor should pursue the right channel to update the governance structure or processes as required.

## SPONSORSHIP—KEYS FOR SUCCESS

Overall, if organizations fail to improve on the area of sponsorship in both projects and change initiatives, the struggle to maximize benefits and achieve results will continue to persist. Addressing change management alone will not yield the desired outcome because doing so will provide a fix for one area, but it will not be a holistic fix that trickles through the organization. Focusing only on change management will also cause a repeat of the same types of mistakes that have been committed by the “flavor-of-the-month” focus on project management, business analysis, portfolio management, maturity models, PMOs, and agile.

When all of these attempts fell short of delivering success, it was not a result of these areas missing the mark, being irrelevant, or being ineffective, but rather it was the implementation of the concepts around them and treating them as silos that led to the *lukewarm* results. It also was the failure to realize the impact that these respective areas had on the people, and improperly gauging how the people would react to them. Many ideas that look good on paper end up delivering less-than-stellar results in reality.

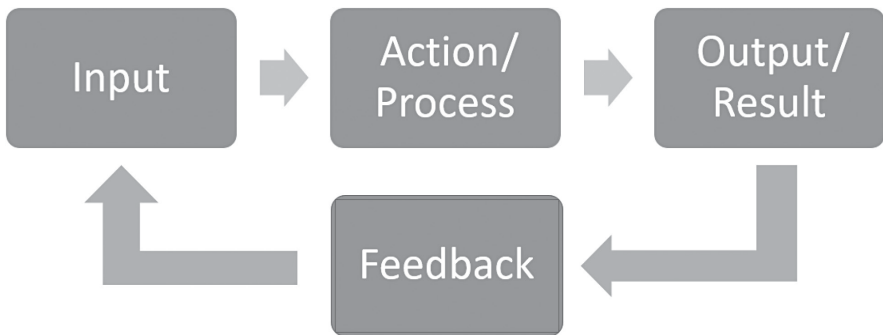
## Feedback Loops

Establishing and maintaining a strong, clear, and timely feedback loop is crucial for effective sponsorship. A feedback loop is a checkpoint in the experience that helps ensure that whatever has to be done is taking place and that information is flowing from the stakeholders back to the decision makers in the project or the change initiative. Project and change sponsors need to ensure that their teams have the ability to collect and understand information quickly and in turn, the sponsor needs to make decisions with limited amounts of information. This is why creating a strong and effective feedback loop is critical for success. The feedback loop must include formal and informal channels, and it needs to involve pre-identified individuals,

along with a definition of their role and a mechanism to allow both ongoing, as well as ad hoc communication. There is also a need for a set of signs, signals, and escalation procedures to enable any side in the loop to initiate communication with minimal effort and red tape. Finally, those involved in this loop must have clear norms and the maturity to retain focus and to avoid drama and overacting.

Feedback loops, as illustrated in Figure 1.9, are about keeping in touch and knowing at any given point what is going on pertaining to any key aspect of the engagement. It does not imply micromanagement; in fact, if the feedback loop works effectively, it is exactly the opposite of micromanagement. A significant part of that loop takes place as part of the training and communication aspects of the engagement, but there is a lot to be said about the informal and ad hoc portions that allow an ongoing flow of information and the ability to effectively manage by exception.

It is common to find project and change practitioners who explain that they do not have time to engage stakeholders, strengthen the communication with team members, improve relationships within or outside of the organization, or enhance the way they manage expectations. In response, the question that should be asked is: “Then what is it you *have* been doing?” PMI found long ago that PMs spend around 80–90% of their time communicating and performing stakeholder engagement activities. In change management it is similar; many of the activities that take



While most of the activities associated with collecting and analyzing feedback take place within our teams (project or change, respectively), it is the role of the sponsor to oversee the establishment of those loops, the collection of feedback, and the analysis. The sponsor then is responsible for authorizing or making the decision based on the feedback and the situation on hand.

**Figure 1.9** Feedback loop

place as part of a change management plan are related to various forms of training and communication. It is therefore critical to allow sufficient capacity and the level of focus to perform these activities effectively and on an ongoing basis. This is why it is essential to maintain that feedback loop and ensure that it is possible to see how things are progressing and at what rate, and to have as clear a picture as possible of the stakeholders' needs, reactions, concerns, and messages.

The *flow* within the feedback loop needs to provide awareness of what occurs and that it all has meaning that can be informative. Figure 1.10 shows us how the cycle works.

Establishing an effective feedback loop may sound trivial, but such a loop will not fulfill its role unless it is set up properly, maintained, adjusted as needed, and action is taken on the signals that are received. Part of the effort takes place



When the terms *context*, *awareness*, and *learning* are used, they mean that there is a need for a mechanism that captures, measures, and analyzes relevant information to further learning, growth, and improvement.

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**Figure 1.10** The feedback loop process



through formal communication and reporting mechanisms, but most of the timely and meaningful information is obtained through a web of informal communications that takes place on an ongoing basis. Due to the structure and frequency of the informal communication, some may view it as quasi-formal; but either way, it is time consuming and complex to set up and manage. Here are several items to consider when trying to establish a meaningful feedback loop:

- *Speed*—determine the speed that is required for communication to flow and for feedback to arrive. It is imperative to ensure that those in need of feedback have access to the effect of actions, simulations, or options that pertain to their needs. Establish who will address their needs, what level of knowledge and experience is required, and what format to use for the feedback.
- *The stakeholder*—the feedback must connect and relate to the needs of the stakeholder and be based on the motivations and the drivers of whoever is involved. This reverts back to the stakeholder analysis and to the importance of understanding people's needs.
- *Measurable*—provide meaningful, actionable, and as much as possible—measurable feedback. Ensure that the feedback is not vague and that it involves action that is in context—relevant and applicable to the specific circumstances.
- *Goals and objectives*—ensure that the feedback provides a solution, or at least a path that is aligned with the stakeholder's goals and objectives.
- *Measurements*—Establish a mechanism to measure the quality and the feedback loop success. The outcomes of the actions and the initiatives need to be collected and understood through a set of quantitative measurements and analytics that will help to identify trends and perform cause-effect analysis.
- *Transparency and ethics*—provide genuine feedback and call for action, then ensure that it focuses on win-win situations and on ensuring that any actions that are taken will work toward constructive results that are in line with all applicable context and rules.
- *People*—make sure that the right people (skills, experience, style, and knowledge) are placed on both (or all) sides of the loop and that everyone in the loop (the provider of feedback and those who receive it) is aware of his/her role.
- *What the loop is about*—set the right expectations about the role of the loop, its mechanisms, the expected turnaround times, and the expected results. The feedback loop may not provide the final solution or, for that matter, any solution, depending on its role.
- *Data and information*—make sure everyone involved knows what data to provide and in what format; and correspondingly, equip those who receive and analyze the feedback with what it takes to convert the data into meaningful information that is a base for decision support. Key performance

indicators may need to be established, researched, or articulated as a benchmark and for decision criteria.

## Back to the Definitions: What Is Sponsorship?

“Project sponsor: A person or group who provides resources and support for the project, program or portfolio and is accountable for enabling success.”<sup>5</sup> As for the change sponsor, there is no clear definition. The change sponsor may be referred to as the change initiator, change champion, or even the change leader. The change sponsor leads the change within the organization, and he/she needs to lead by example and be the first person to articulate and work toward the change. While there is no clear and short definition of the role of the change sponsor, according to Procsi,<sup>6</sup> the sponsor has to participate visibly throughout the project, communicate support and promote the change, and build a coalition of leaders to support the change.

## RECAP

This chapter looked into the basics of what change and project management are, what change and project sponsorship are, and the challenges associated with the respective roles. It examined generic challenges, as well as challenges associated with different stages throughout the project and the change.

The need to connect between change and projects was reiterated by ensuring that the projects that are within the change initiative are aligned with the bigger picture and that they produce value toward the intent of the change. This chapter also touched on the notion that although every project introduces a level of change to the organization, change management is about a more strategic type of change to the organization. Recalling the days when project and change management were one, it was discovered that good project management involves elements of change management, and extrapolated that in the near future project and change management will have to converge back into one.

An interesting question was raised in this chapter: what is it that change and project managers or sponsors do if they do not communicate? It is puzzling that many individuals who lead or sponsor projects and change do not find the time to properly communicate with and engage their stakeholders and team members. In fact, there is nothing that is more important than communicating and engaging effectively.

Overall, it is clear that there is a problem with sponsorship when it comes to both projects and change initiatives. The problem is with both the definition of the sponsor's role as well as with the expectations and the performance of sponsors—and the result is poor sponsorship. What does poor sponsorship mean? It appears in many forms, but the end result is the same: failure to deliver on the intended

set of values and benefits for the organization, along with all of the negative symptoms that are associated with costs and schedule overruns, unhappy customers and stakeholders, and other performance issues for the organization.

This chapter poses many questions and no real answers as to what it takes to become an effective project or change sponsor. Chapter 2 takes us through the process of looking into the root causes of problems with sponsorship, and it provides actions and concepts that can help improve both project and change sponsorship.

## NOTES

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