

Organisational change and transformation

One formula and four key rules, each with a worked example, then the two model sheets. They serve IPMA, PMI and APM exams alike.

KEY RULES

Outputs bring benefits only when people use them

benefit at risk = (target share – actual share) × volume × value

Measure use after go-live, not only the date. The benefit owner and the sponsor act on a gap: raise adoption, or re-set the target on evidence.

Example: A tool should take 80% of 30,000 requests a year and takes 60%: $(0.8 - 0.6) \times 30,000 = 6,000$ requests still handled by staff; at €8 each, €48,000 a year of saving is at risk

Read the culture at three levels (after Schein, 2004)

artefacts · stated values · shared assumptions

Artefacts are what you see; stated values, what people say matters; shared assumptions, what nobody questions. Watch what is measured and praised. Change the artefacts that hold an unhelpful assumption in place.

Example: A team says 'customers first', but its weekly board ranks staff by calls handled: a busy day counts as a good day. A change meant to cut calls by 30% needs a new measure first

Resistance is information

ask what each group fears to lose: a skill, status, control or certainty

It may reveal a real flaw, and it often comes from the managers of those affected. Test the claim, fix what is real, and let people shape the details.

Example: 8 of 20 inspectors say a tablet form is slower: 4 minutes against 3 on paper. Removing 2 fields brings it to 2.5 minutes, and 2 of the 8 help test the fix

Plan support for the dip (stages after Kübler–Ross, 1969)

doubt → frustration and loss → low point → new routine

Not a timetable: people skip stages or slip back. Honest facts early, training close to use and help on the spot make the dip shallower and shorter.

Example: 200 staff switch systems in month 3: training in the 2 weeks before, and 1 floor helper per 25 staff ($200 \div 25 = 8$ helpers) for the first 4 weeks

Lead in steps, then make it last (after Lewin, 1947; Kotter, 1996)

unfreeze → move → refreeze

Unfreeze: make the need felt. Move: clear obstacles, plan early wins. Refreeze: change roles and measures; switch the old way off. Kotter's eight steps fall into these groups. Name who sustains it: the benefit owner measures use; the sponsor holds reviews.

Example: A booking system goes live in March; the old one is switched off after 6 weeks, and benefit reviews follow at 3, 6 and 12 months

IN THIS HANDOUT

Change curve

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Leading change in steps

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Sources: IPMA ICB4 (2015); PMI, PMBOK® Guide, 8th ed.; PMI, PMP® Examination Content Outline (2026); APM Body of Knowledge, 8th ed.; APM, PMQ handbook (v6, 2026); Schein, Organizational Culture and Leadership (3rd ed.); Kübler–Ross, On Death and Dying (1969); Holdsworth & Bridgman (2025); Lewin (1947), Frontiers in group dynamics; Cummings, Bridgman & Brown (2016); Kotter, Leading Change; IPMA International Certification Regulations (ICR) v4.4 (2025)

Key: IPMA = International Project Management Association; ICB4 = IPMA's Individual Competence Baseline; PMI = Project Management Institute; PMBOK® Guide = PMI's body-of-knowledge guide; PMP® = PMI's Project Management Professional; APM = Association for Project Management; PMQ = APM's Project Management Qualification; ICR = IPMA's International Certification Regulations. Unofficial study material for IPMA®, PMI® and APM exams. Not affiliated with, endorsed by or approved by IPMA, PMI or APM, and not an accredited or endorsed training provider. IPMA® and IPMA ICB® are registered trademarks of IPMA in Switzerland and other countries. PMI, PMP, CAPM and PMBOK are registered marks of Project Management Institute, Inc. APM is a trade mark of the Association for Project Management. Other marks belong to their owners. PMP® exam facts are from PMI's public PMP® Examination Content Outline (2026); check the current version on pmi.org. APM's qualifications are its own; this series is not an APM Accredited Provider or APM Endorsed. Examples use a fictional city and its projects.

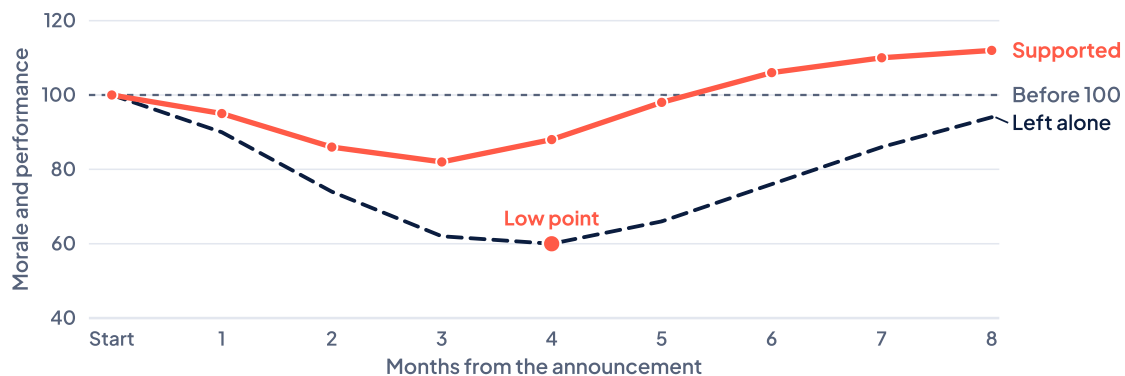


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Change curve

Expect how people often react to a change over time, and plan support so that the dip is shallower and shorter.



Illustrative index, our own curve. Not the Kübler-Ross Change Curve®, a registered trademark of the Elisabeth Kübler-Ross Family Limited Partnership.

WHAT IT IS

A change curve pictures how people often feel and perform after a change is announced: doubt, frustration and loss, a low point, then the new way becoming routine. It adapts the stages of reaction that **Elisabeth Kübler-Ross** (1969) described in dying patients; later writers drew the curve (Holdsworth and Bridgman, 2025). It is not a timetable. Your job: a **shallower, shorter** dip.

HOW IT WORKS

- 01 Before: what changes for each group, what stays, and why.
- 02 Doubt and loss: repeat the facts, listen, fix real flaws.
- 03 Low point: train close to use; help on the spot.
- 04 New routine: share wins, switch the old way off, measure use.

MID-LEVEL · WORKED EXAMPLE

Apply it well

The situation: A city team has 8 months to move resident parking permits online; 40 wardens move to plate checks on handhelds, and 18 service-desk staff lose most counter visits.

The project manager expects the dip at go-live, a few weeks before most residents renew in January. Training comes in the last 2 weeks, supervisors help on the street, and she stays through January.

In the exam: Name the stage people were in, what you did at that stage, and how you kept the dip short and shallow.

SENIOR · WORKED EXAMPLE

Design and lead it

The situation: A city is joining 14 online services under one login over 30 months, in 3 groups of services; counter staff move to digital help.

The project manager plans one curve per staff group and switch-over, so the dips do not stack. Staff are consulted through their union first. The board agrees that a short dip after each switch is expected.

In the exam: Show that you planned several curves, set the board's expectations for the dip, and measured use of the new way, not only go-live.

WHERE IT SITS

IPMA · ICB4

4.5.13: impact of change on individuals (p. 151); sustain it, avoid falling back (4.5.13.4, p. 153)

PMI · PMBOK® GUIDE 8 · PMP® EXAM

Guide: no change curve; change management, current to future state (p. 266). Exam outline: Business Environment, task 7

APM · BOK 8 · PMQ EXAM

BoK (APM's Body of Knowledge) §1.3.2 (resistance is the default), §1.3.3 (support people emotionally). PMQ (APM's Project Management Qualification) objective 8

Sources: Kübler-Ross, On Death and Dying (1969); Holdsworth & Bridgman (2025); IPMA ICB4 (2015); PMI, PMBOK® Guide, 8th ed.; PMI, PMP® Examination Content Outline (2026); APM Body of Knowledge, 8th ed.; APM, PMQ handbook (v6, 2026)

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Leading change in steps

Plan the people side of a change in an order that works: make the need felt, move with support, then make the new way last.

PHASE	WHAT YOU DO	SIGN IT WORKS
Unfreeze	Make the need felt	People can say why, in their words
Unfreeze	Leading group; one clear story	Leaders tell the same story
Move	Clear obstacles; train; pilot	People try the new way
Move	Early wins, used to go further	Wins are seen and credited
Refreeze	Roles, measures; old way off	Use holds after handover

Our summary, after Lewin (1947) and Kotter (1996). Change is rarely linear, so loop back as you learn.

WHAT IT IS

Kurt Lewin (1947) described change as unfreezing the old level, moving, and freezing the new one; the tidy three steps came later (Cummings and colleagues, 2016). **John Kotter** (1996) set out eight steps in three groups: four loosen the old ways, three bring in the new, one makes it stick. The table is our summary. Change is rarely linear, so adapt.

HOW IT WORKS

- 01** Assess first: who is affected, how much, and how past changes went.
- 02** Unfreeze: the need, with facts; one picture, told often; listen.
- 03** Move: clear obstacles, train, pilot; plan early wins.
- 04** Refreeze: change roles and measures; switch the old way off.

MID-LEVEL • WORKED EXAMPLE

Apply it well

The situation: A city team has 8 months to move resident parking permits online; 40 wardens in 9 zones will check licence plates on handhelds, not paper permits.

The sponsor explains why the checks change. Supervisors help design them, the wardens of 1 zone try them first, and the results are shown in the other 8. At go-live the paper checks stop.

In the exam: Walk through your own example: how you made the need felt, what blocked people, and how it stuck.

SENIOR • WORKED EXAMPLE

Design and lead it

The situation: A city is joining 14 online services under one login over 30 months, in 3 groups of services; the old portals close at the end.

The city's chief executive sponsors the change; the head of customer service co-leads it. Early wins are shown to later groups. Roles and measures change before each switch, and owners report use after handover.

In the exam: Show a strategy for many groups: who leads it with you, how consultation fits the timing, how wins feed the next phase, and who sustains it.

WHERE IT SITS

IPMA • ICB4	PMI • PMBOK® GUIDE 8 • PMP® EXAM	APM • BOK 8 • PMQ EXAM
4.5.13.3: a stepwise approach, so early successes encourage more; 4.5.13.4: reinforce new behaviour	Guide: no step model; enabling change merged into Focus on Value (p. 259). Exam outline: Business Environment, task 7	BoK (APM's Body of Knowledge) §1.3.3: change models share elements; §3.1.3: benefits realisation. PMQ (APM's Project Management Qualification) objective 9

Sources: Lewin (1947), *Frontiers in group dynamics*; Cummings, Bridgman & Brown (2016); Kotter, *Leading Change*; IPMA ICB4 (2015); PMI, *PMBOK® Guide*, 8th ed.; PMI, *PMP® Examination Content Outline* (2026); APM *Body of Knowledge*, 8th ed.; APM, *PMQ handbook* (v6, 2026)

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