

A background image showing three people in a modern office setting. A woman with blonde hair is seated at a wooden table, looking towards the right. A man with a beard and grey hair is seated next to her, looking towards the camera. Another person is partially visible in the foreground, looking away from the camera. The scene is lit with warm, ambient light from desk lamps.

Prosci®



Change Portfolio Management

September 17, 2025

Purpose:

To VISUALIZE your portfolio of projects to ANALYZE change saturation and collision to mitigate ADOPTION RISK.

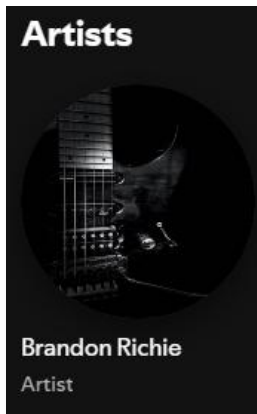
Meet Your Facilitators

Brandon Richie is a Director Engagement Leader and Executive Instructor in Advisory Services at Prosci, with a vast history of leading Enterprise Change, growing change capability and change maturity across organizations.

Brandon has created and managed Communities of Practice/Centers of Excellence, mentored and developed Change Practitioners and Executive Leaders, focusing on overall Organizational Effectiveness.

Fun facts and passions:

- Based in Boston, MA
- Semi-professional musician
- Former radio on-air disc jockey
- Enjoys skiing, golfing, running, boxing, recording music



Brandon Richie
*Director Engagement Leader/
Executive Instructor*

Agenda



1

Introduction

What is portfolio
change management?
Why it is important?
How much is too much?

2

Foundations

Define saturation,
collision
Learn from the research
VMO and action planning

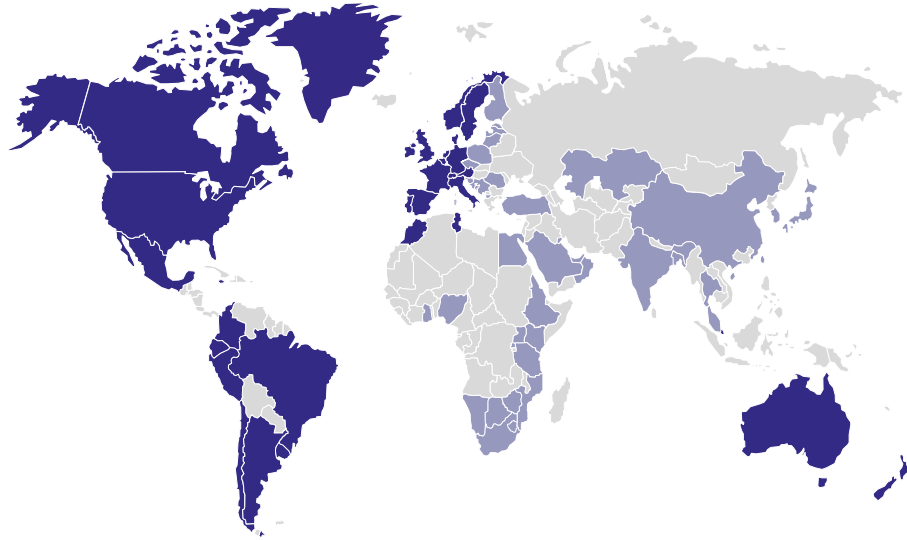
3

Project Inventory & Dashboards

Risk, Resources, Rhythm, Rules
Change Portfolio Dashboards in
Action

No one delivers on **change success** like Prosci.

We invented the change management framework used today by consultancies and organizations around the world.



■ Prosci Direct Regions ■ Prosci GAN Partner Regions

Creators of the globally renowned **ADKAR® Model**

25+ years of change proprietary research

Over 150,000 certified worldwide

Top change management trainer **globally**

A **partner to execute on change** and to make your organization stronger

The only firm **focused on creating change competency** and change capability

Solutions for **over 80 countries** through a direct presence and integrated global partner network

Poll: Opening Discussion

- How many of the following are applicable?



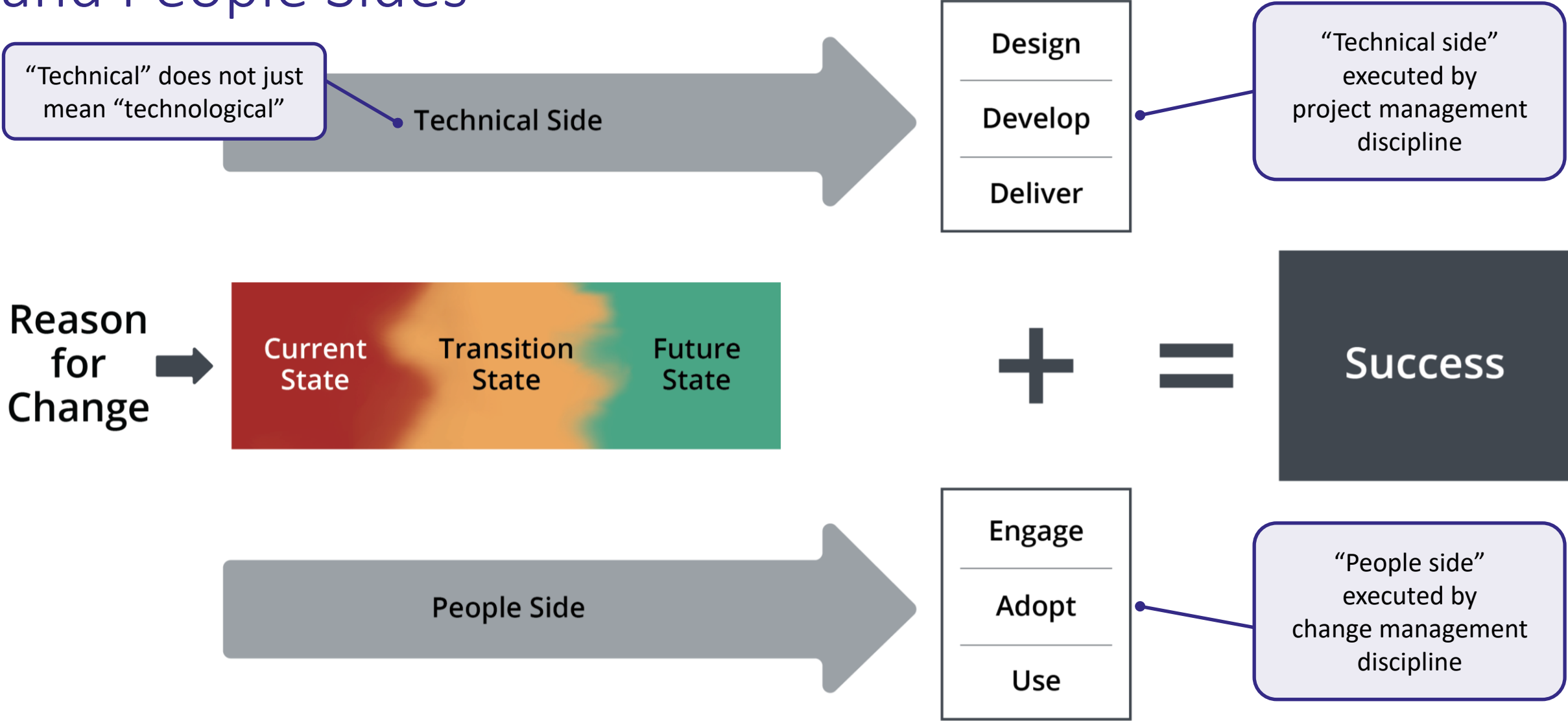
Join by Web PollEv.com/brandonrichie Join by Text Send **brandonrichie** to **22333**



The People Side of Portfolio Management

**Addressing the
saturation and
collision of
multiple projects,
initiatives or
work efforts.**

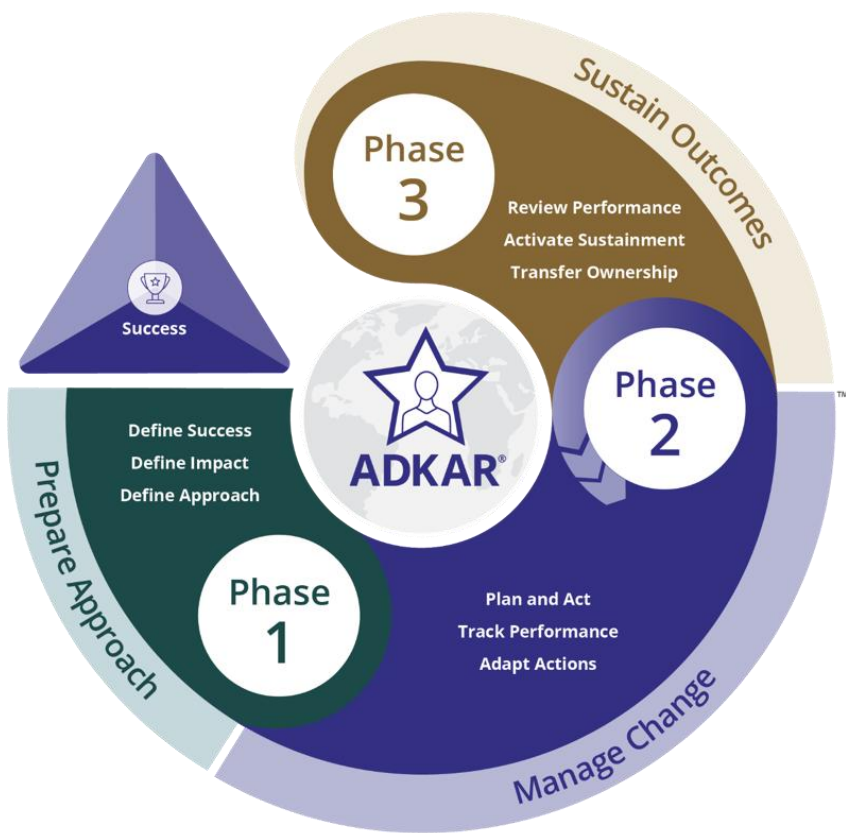
Unified Value Proposition (UVP) = Balance Technical and People Sides



ADKAR Model on a Page

ADKAR element	Definition	What you hear	Triggers for building
A Awareness	Of the need for change	"I understand why..."	Why? Why now? What if we don't?
D Desire	To participate and support the change	"I have decided to..."	WIIFM Personal motivators Organizational motivators
K Knowledge	On how to change	"I know how to..."	Within context (after A&D) Need to know <i>during</i> Need to know <i>after</i>
A Ability	To implement required skills and behaviors	"I am able to..."	Size of the K-A gaps Barriers/capacity Practice/coaching
R Reinforcement	To sustain the change	"I will continue to..."	Mechanisms Measurements Sustainment

Prosci 3-Phase Process Plain Language Questions



Define Success
Define Impact
Define Approach

Phase 1

Prepare Approach

Define Success

What are we trying to achieve?

Define Impact

Who has to do their jobs differently and how?

Define Approach

What will it take to achieve success?

Change Management Strategy

Plan and Act
Track Performance
Adapt Actions

Phase 2

Manage Change

Plan and Act

What will we do to prepare, equip and support people?

Track Performance

How are we doing?

Adapt Actions

What adjustments do we need to make?

Master Change Management Plan

Review Performance
Activate Sustainment
Transfer Ownership

Phase 3

Sustain Outcomes

Review Performance

Now, where are we?
Are we done yet?

Activate Sustainment

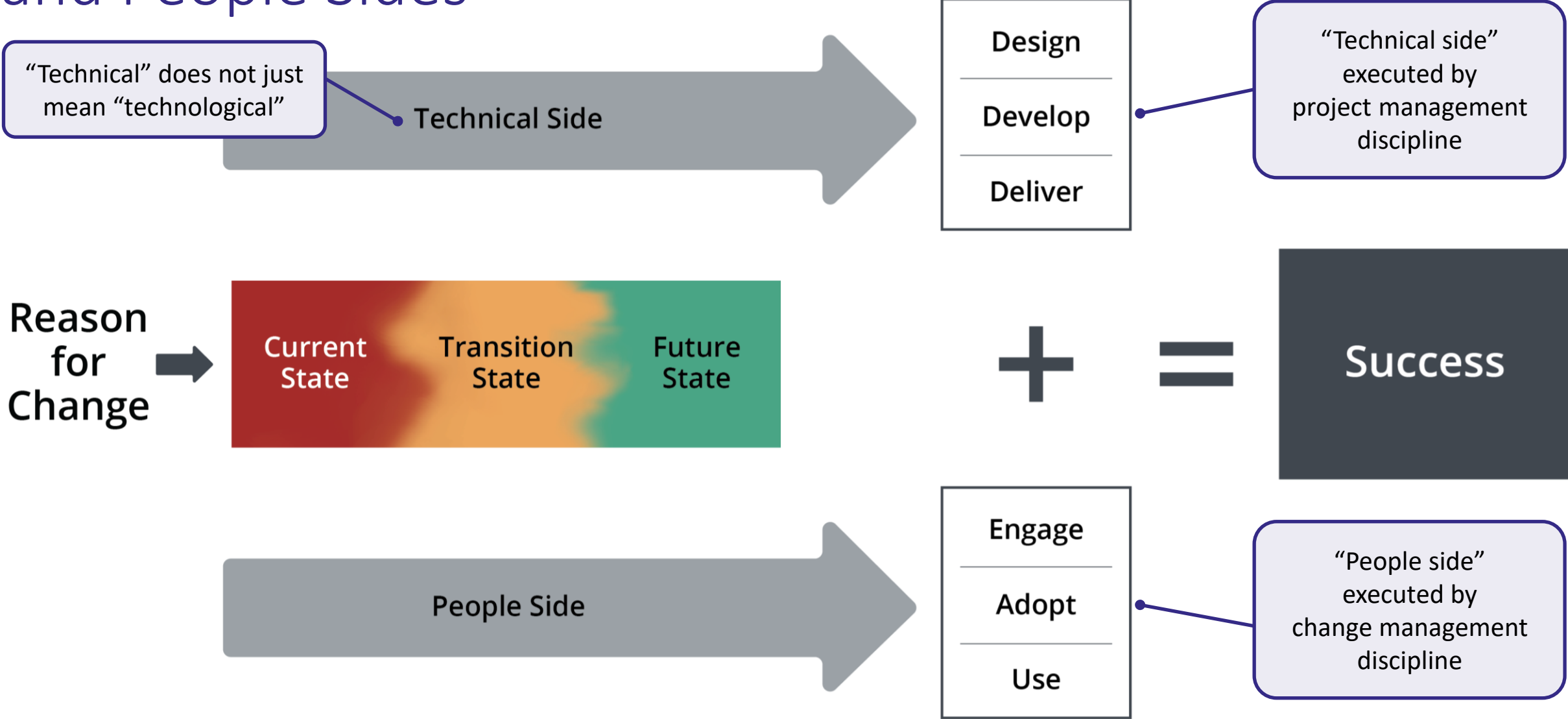
What is needed to ensure the change sticks?

Transfer Ownership

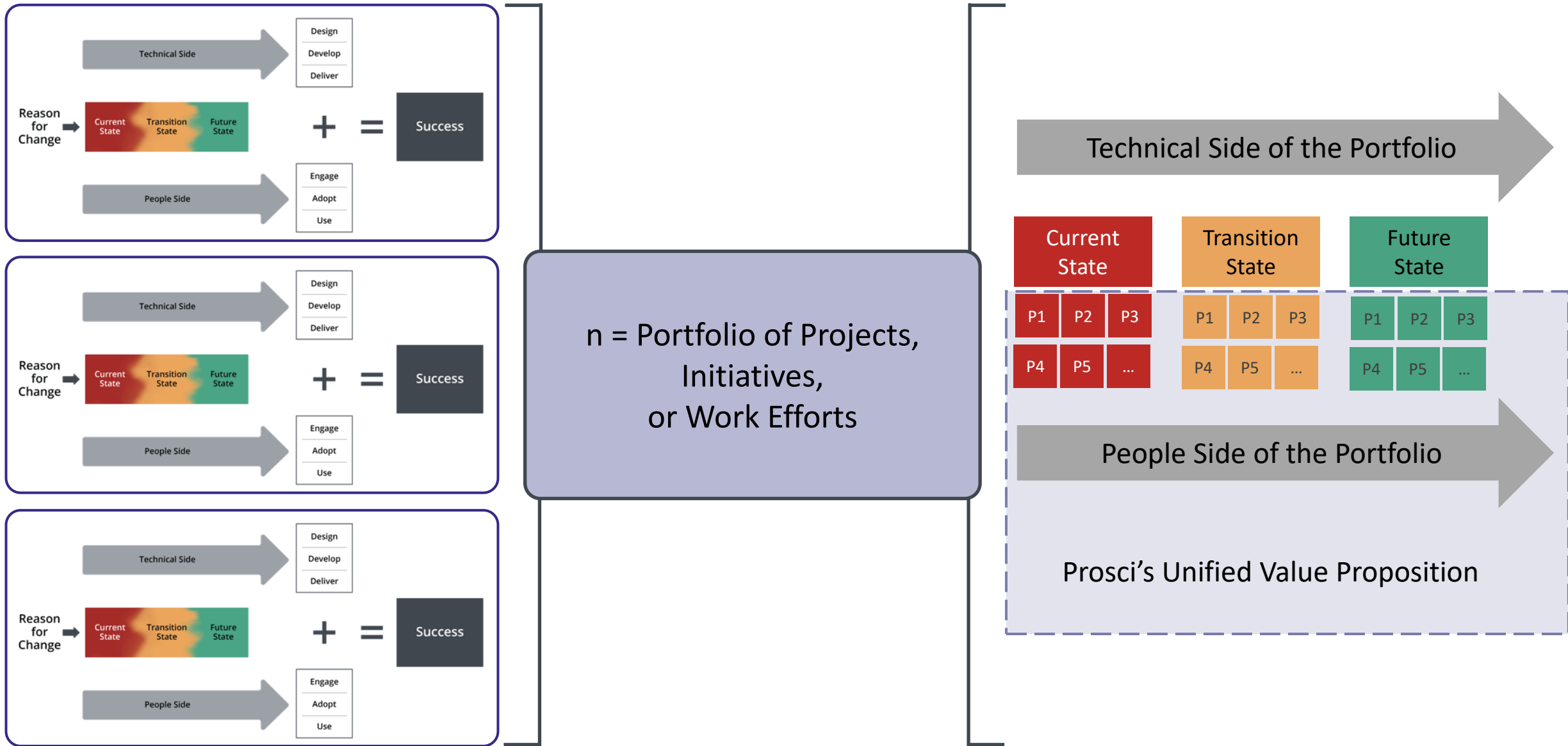
Who will assume ownership and sustain outcomes?

Change Management Closeout

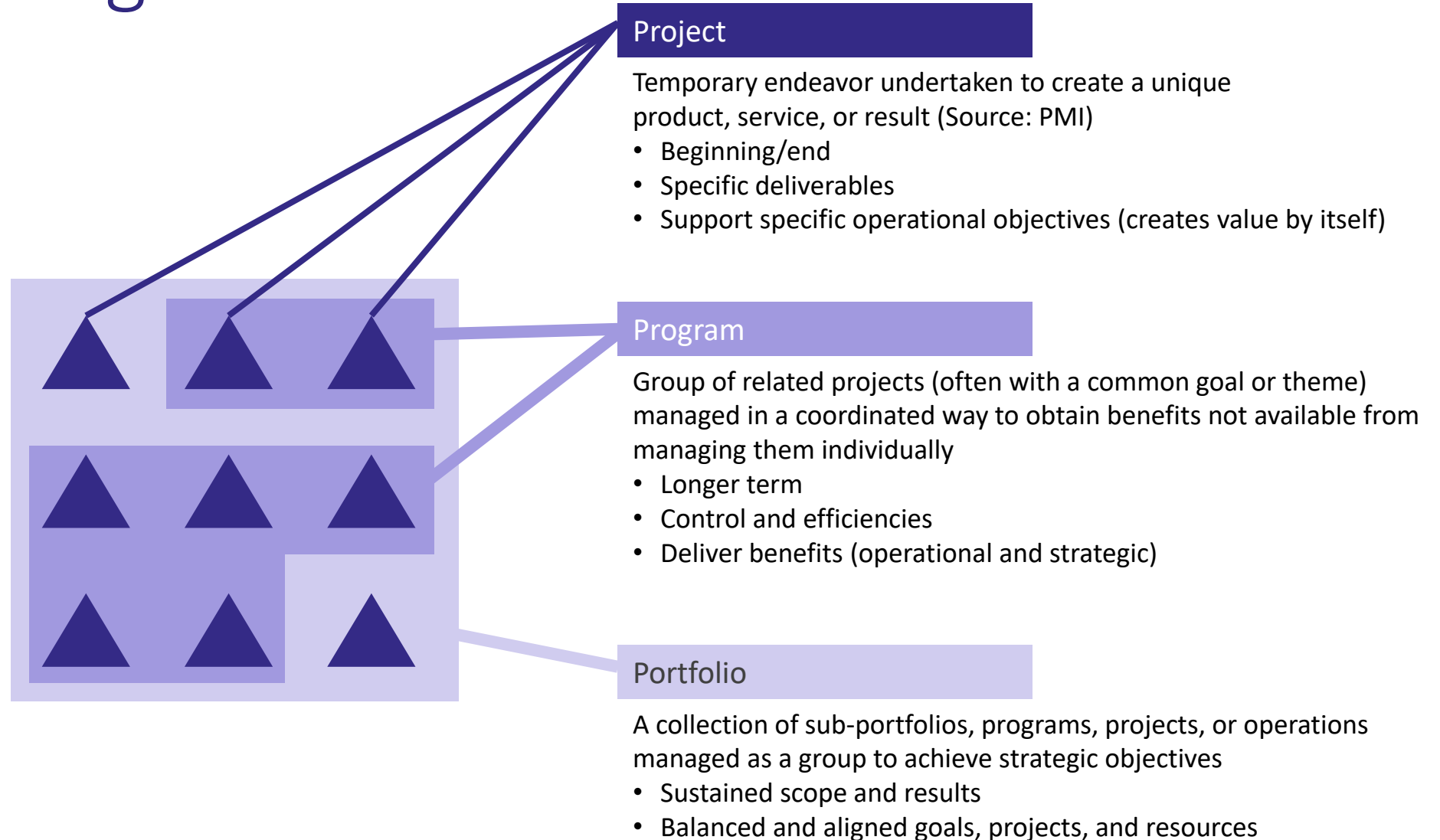
Unified Value Proposition (UVP) = Balance Technical and People Sides



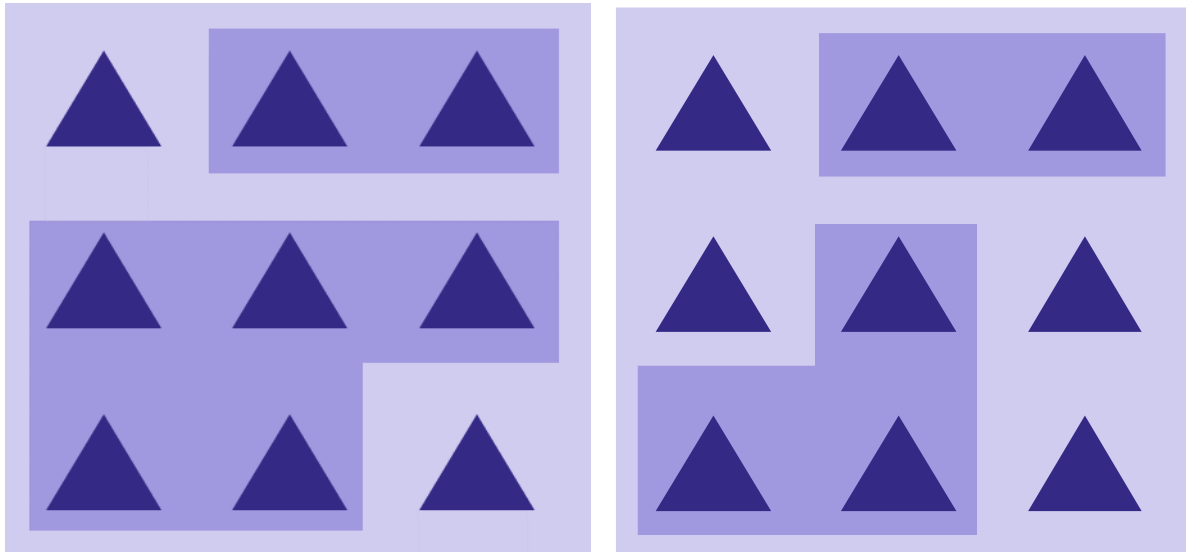
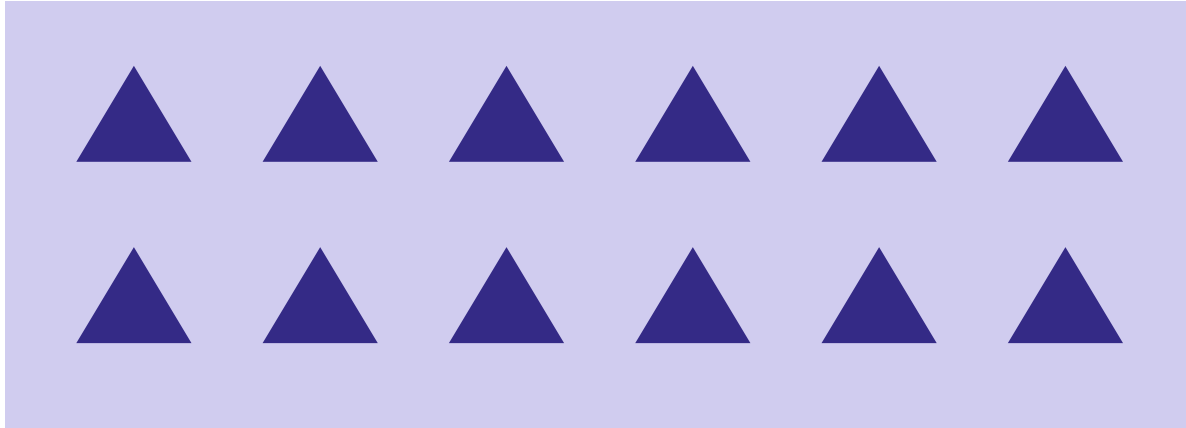
Address the Change Impact of Multiple Projects



Common terms to differentiate Project, Program and Portfolio



It Gets Complex Quickly



Variables to Address:

- Strategic Alignment (Impacts Selection & Prioritization)
- Project, Program, and Portfolio Definition and Scoping
- **People**, Process, and Technology (Data & Tools) Capabilities
- Standards, Metrics, and Governance
- **Organizational Culture**
- Budgets and Resource Allocation
- Timelines and Dependencies
- **Impacted Groups and Types of Impact**
- Risk Management
- Others?



How much is too much?

Factors to consider

- *Organizational Capacity*
- *Change Characteristics*
- *Employee Resilience*

Major Changes

- **At Once:** Organizations typically find that managing **2-3 major changes simultaneously** is optimal. This allows for sufficient focus and resources to be allocated to each initiative **without overwhelming** employees.
- **Per Year:** A general guideline is to limit the total number of major changes to **5-10 per year**. However, this should be adjusted based on the specific context and **capacity of the organization**.

Minor Changes

- **At Once:** Employees may handle more minor changes concurrently, often **up to 5-10** minor changes at once, depending on their **nature and impact**.
- **Per Year:** The number of minor changes can be higher, potentially exceeding **10-20 changes per year**, but this also depends on how these **changes are structured** and communicated.



How much is too much?

Organizations that **stagger** major changes over time, rather than implementing them all at once, see **higher success** rates. They recommend allowing sufficient time for employees to **adapt to one change before introducing another**.

-McKinsey & Company

Employees can generally manage **one significant change every 6 months**. Beyond this, the risk of **change fatigue** increases, leading to decreased productivity and morale.

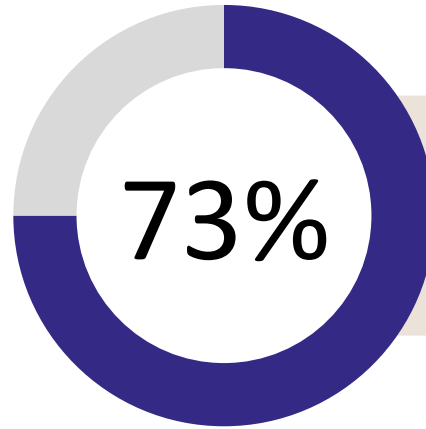
-Harvard Business Review

Organizations with high change agility—those that support their employees through change with clear communication and resources—can manage more frequent changes. However, even in these environments, it's recommended **to limit major changes to one or two per year**.

-Deloitte Insights

Change Saturation Has Consequences

Are we
listening to the
research?



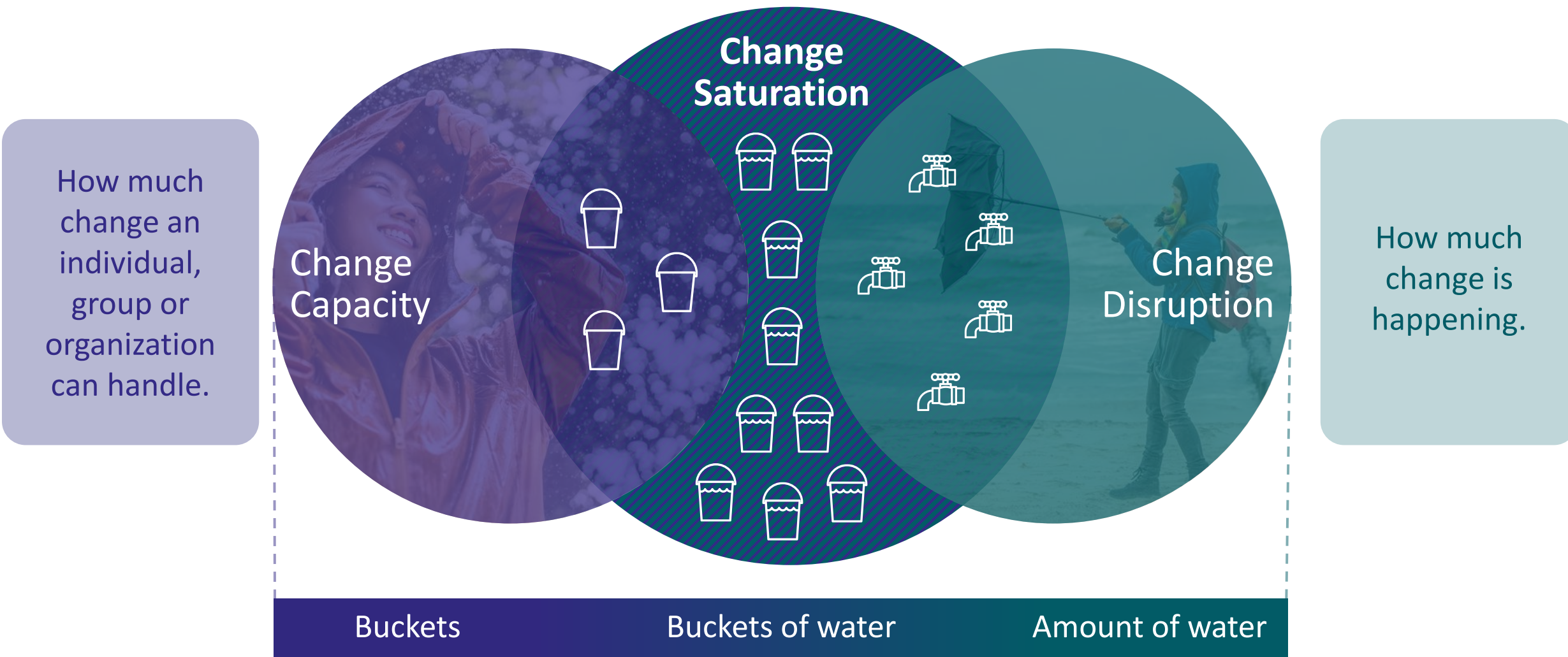
Of organizations are at, near
or beyond change saturation

The consequences of change saturation include:

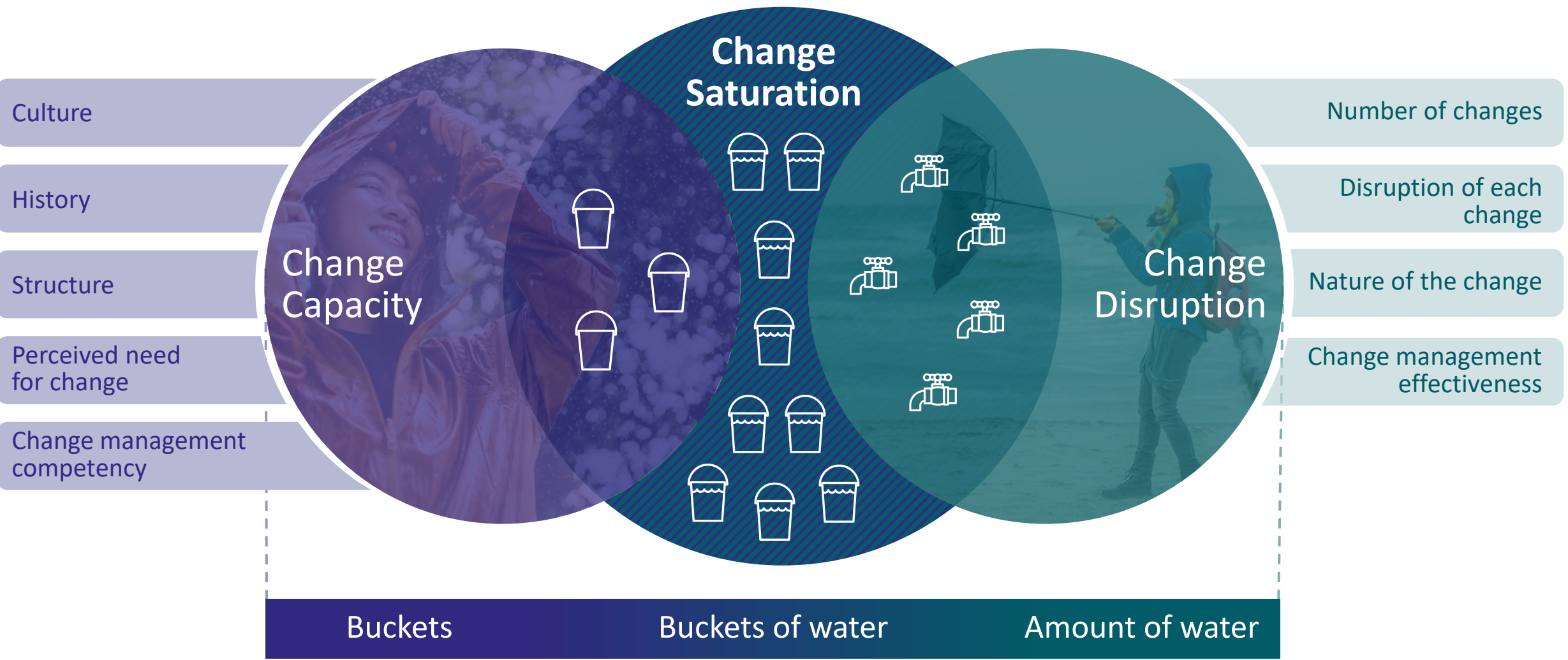
1. Individuals suffer
2. Projects suffer
3. Organizations suffer

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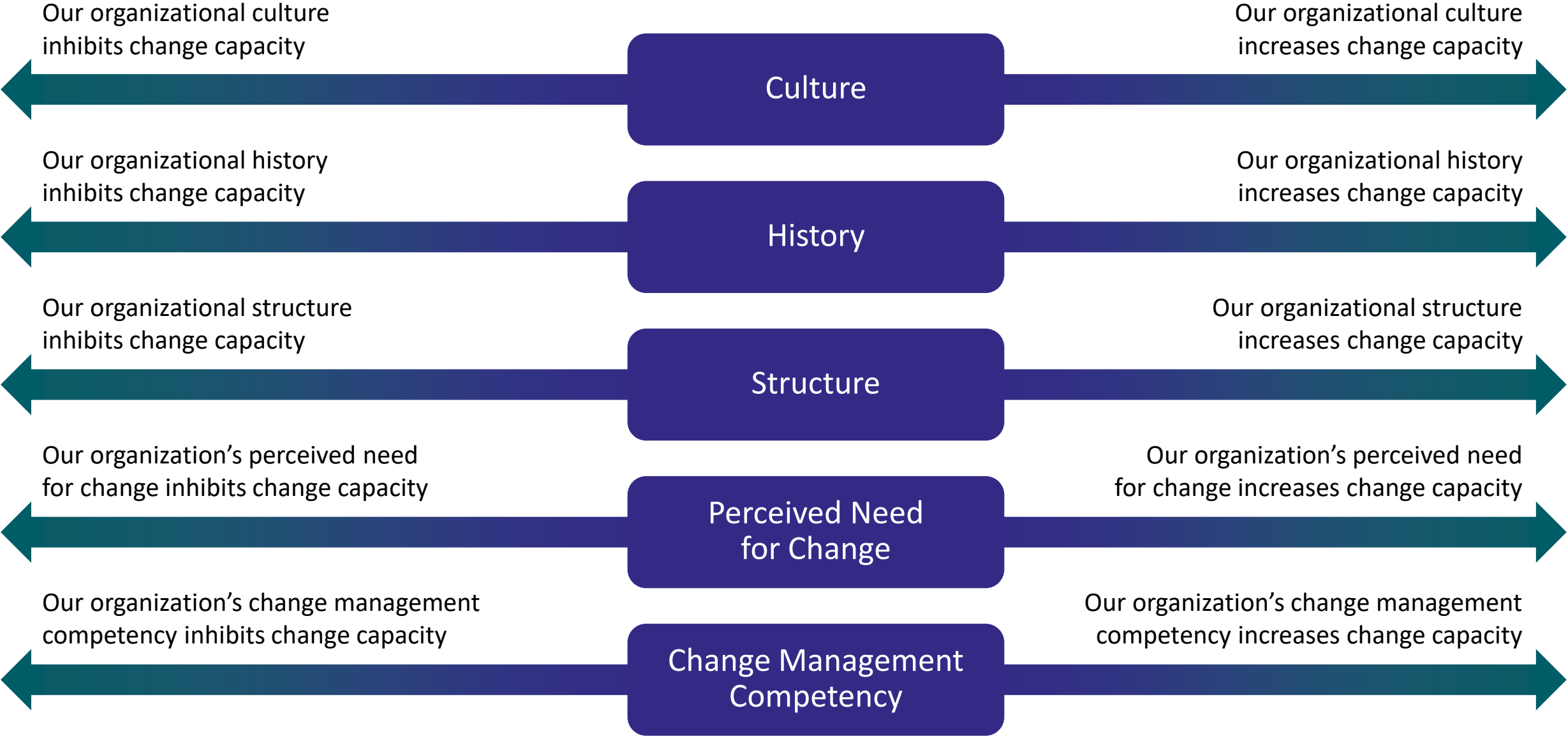
Prosci Change Saturation Model



Prosci Change Saturation Model



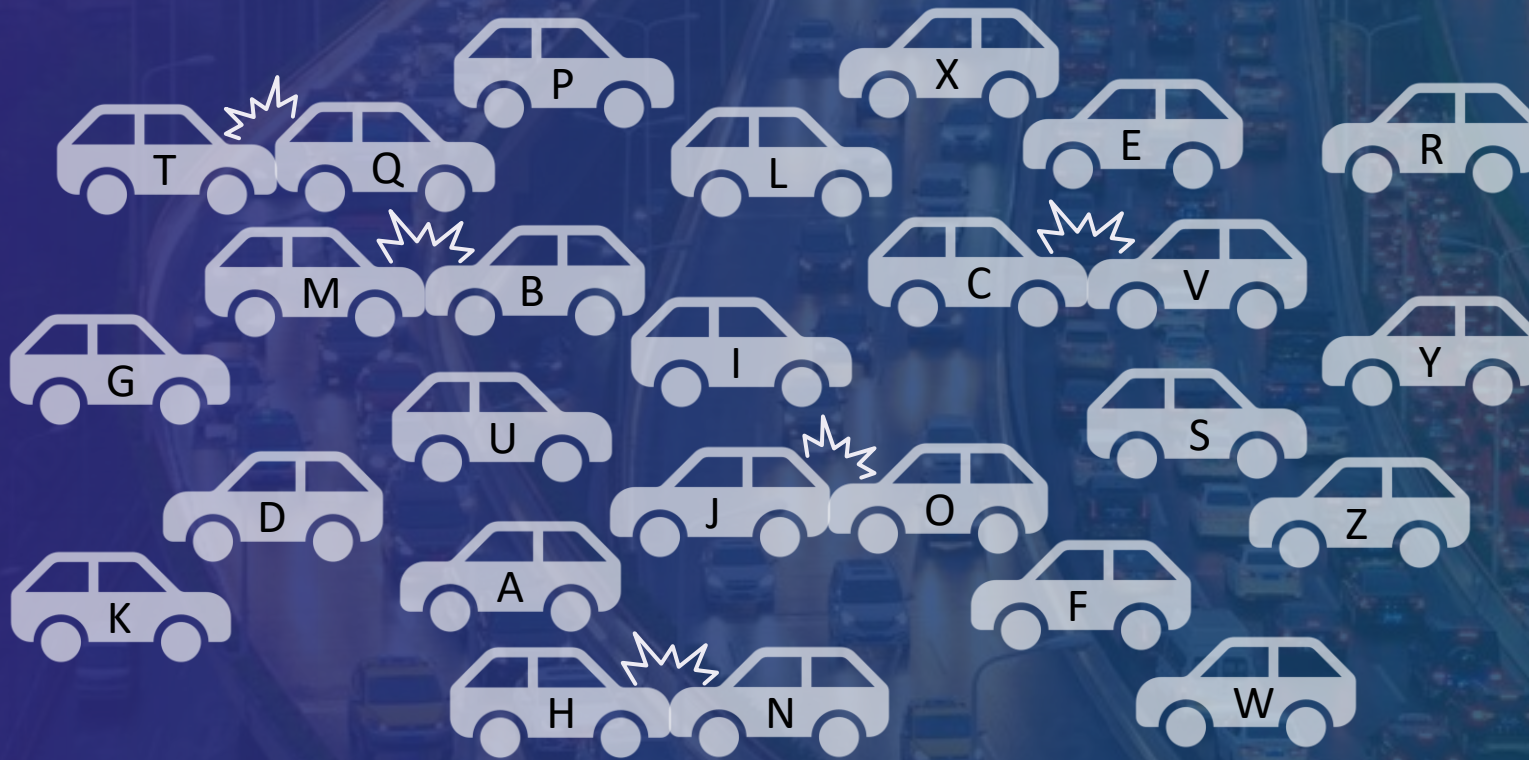
Change Capacity Assessment



What are we doing to address change saturation?

1. Nothing
2. Apply portfolio management techniques
3. Support prioritization
4. Use of organizational management structures
5. Adjust the portfolio
6. Increase communication efforts

Deeper Dive on Change Collision



**Addresses not just
timeframe, but
collisions of resources
(time and money),
priorities and
mindshare.**

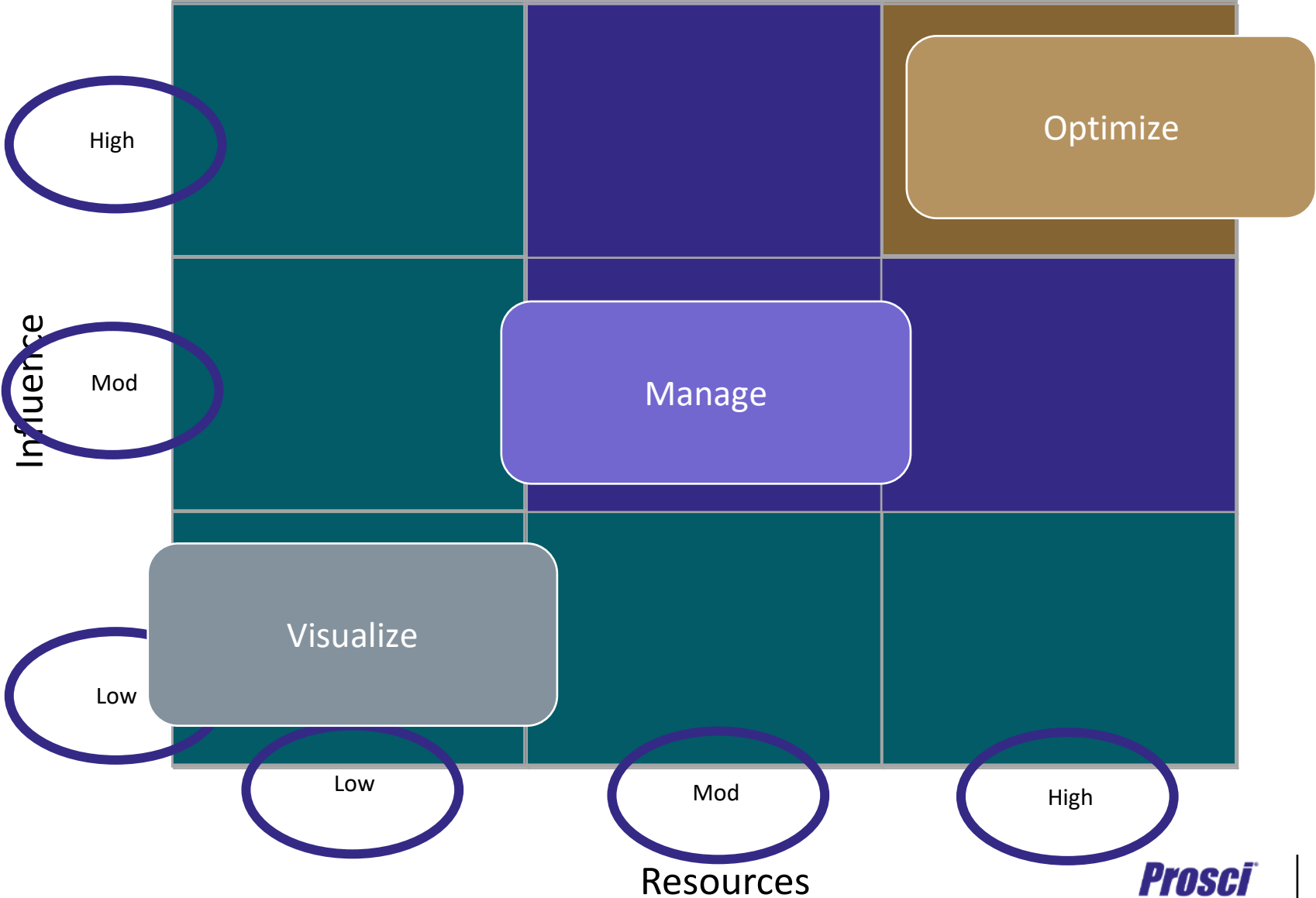
No clear picture of the changes going on across the organization,
the interdependencies, and when they will impact users.

Change Portfolio Management Scale Plot (VMO)

Optimize: Influence business activities to minimize change saturation and collision
Outcome: Optimal Portfolio Composition

Manage: Inform decisions with the view of change saturation and collision
Outcome: Realize Portfolio Benefits

Visualize: See change saturation and collision
Outcome: Execute Projects Successfully



Portfolio Maturity Roadmap



What level are you pursuing?

V/M/O Context: CPM Dashboard

	Visualize	Manage	Optimize
Outcomes	Execute Projects Successfully	Improve Portfolio Benefits Realization	Influence Business Strategy
Technique	To explore change saturation and collision	To inform decisions with your view of change saturation and collision	To influence business activities with your knowledge of change saturation and collision
Tips	• Define your audience • Data collection • Keep it fresh	• Define your scope • Integrate with project portfolio management • Keep it actionable	• Establish roles and coordination requirements • Integration with strategy formation activities • Keep it relevant
Tools and Instructions	• Project portfolio definition • Resulting change portfolio • Project health • Project risk • Job aspects of the change portfolio • Impact group heat maps • Schedule milestones	• Project selection • Project investment • Project health vs. investment • Resource decisions • Sponsor saturation and coaching • Impact group adjustments • Project and milestone timing	• Initiative and change project Identification and assessment • Sponsor engagement and leadership • Project and change portfolio Decision support • Organizational strategic alignment

What's Different at the Portfolio Level?

Threats to Success

Risk

Stakeholders
Project
Portfolio
Adoption

People/Tech

Resources

Shared
Limited
Financial/ROI
Build/Buy/Borrow

Business & Projects

Rhythm

Timing
Cadence
Dependencies
Intersections

Governance & Decisions

Rules

Strategic Alignment
Funding
Prioritization
Go/No-Go

PEOPLE CENTRIC PORTFOLIO DASHBOARD

Change Portfolio Project Inventory

To begin creating a change portfolio dashboard, please complete a Project Profile for each project in the portfolio. Please click "Begin" to add your first project.

Project Profile

Basic Information

Project Name *

Project Purpose *

Project Sponsor *

Project Manager *

Change Practitioner *

Go Live Date *

Project Budget *

Project ROI Estimate

Impacted Groups *

☐ Human Resources

☐ IT

☐ Accounting

☐ Finance

☐ Marketing

☐ Customer Service

☐ Operations

☐ Sales

☐ Legal

Risk Assessment *

Change Characteristics (14-70) *

Organizational Attributes (14-70) *

Enter a value between 14 and 70

Enter a value between 14 and 70

PCT Assessment

Leadership/Sponsorship (10-30)

Project Management (10-30)

Change Management (10-30)

Success (10-30)

Project Portfolio

+ Add Project

Total Projects
4

Total Budget
\$2,350,000

Next Go Live
Sep 21, 2025

Projects

Project Name	Budget	Go Live Date	Change Capacity	Impacted Groups	Actions
Call Center AI Scheduler Reduce call time for inbound calls to call center.	\$600,000	Sep 21, 2025	1.5	Customer Service Sales IT	
Proposal Magic AI driven proposal creation tool to speed up bid process	\$700,000	Oct 13, 2025	4.5	Marketing Sales Human Resources	
Architecture Design with AI Faster designs	\$600,000	Nov 13, 2025	2.0	IT Sales Marketing +1 more	
Swift Hire HR automation tool	\$450,000	Dec 9, 2025	2.8	Human Resources IT	

Company X's CPM Dashboard

Risk

Visualize the Risk



Impact by Business Area

Administration Clinical Services Community Health Community Relations Human Resources Information Technology Patient Care Research and Development

1000

500

Visualize the Work
Manage the Resources
and Timelines

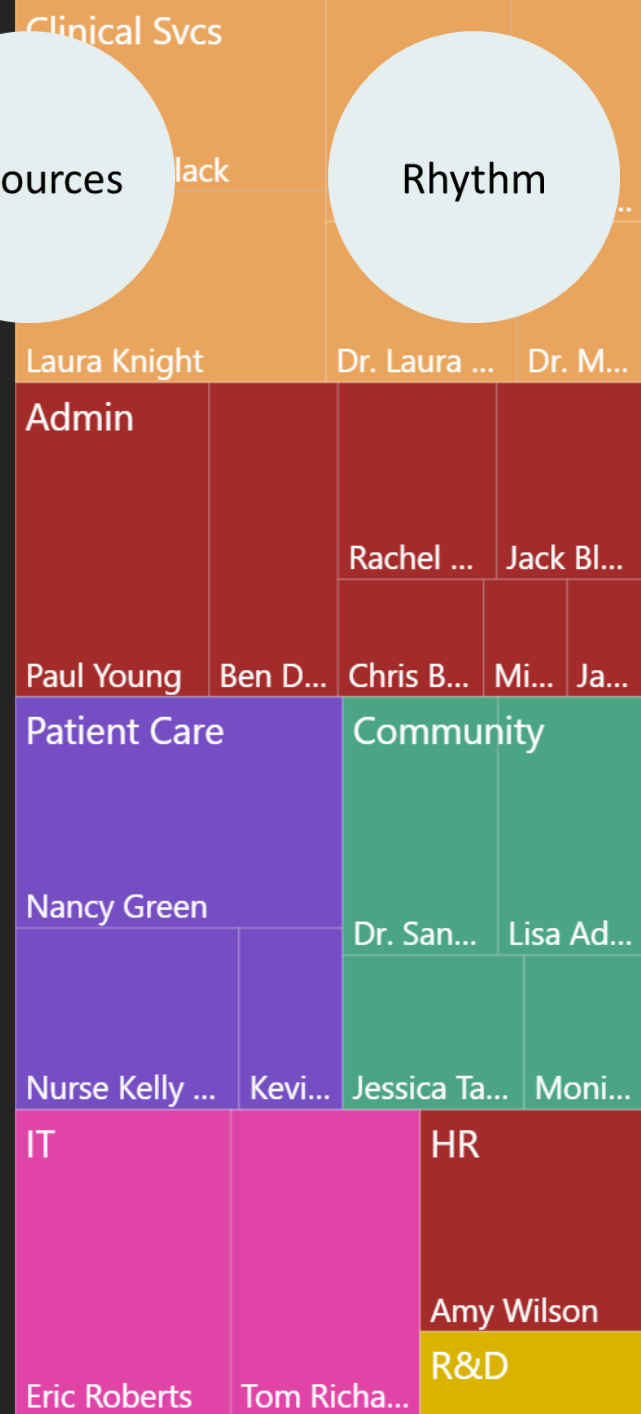
April May June September October November December

February March April May June September October November December

	February	March	April	May	June	September	October	November	December
Community Health Workers									
Data Analytics Team									
Education and Training									
Emergency Response Team									
Facilities Management									
Finance Department									
Health and Safety									
Human Resources									
IT Support									
Legal and Compliance									
Marketing and Outreach									
Medical Records									
Nursing Staff									
Operations Team									
Patient Relations									
Patient Scheduling									
Pharmacy Team									
Preventive Care Unit									
Quality Assurance									
Radiology Department									
Research Team									
Telemedicine Unit									
Volunteer Services									

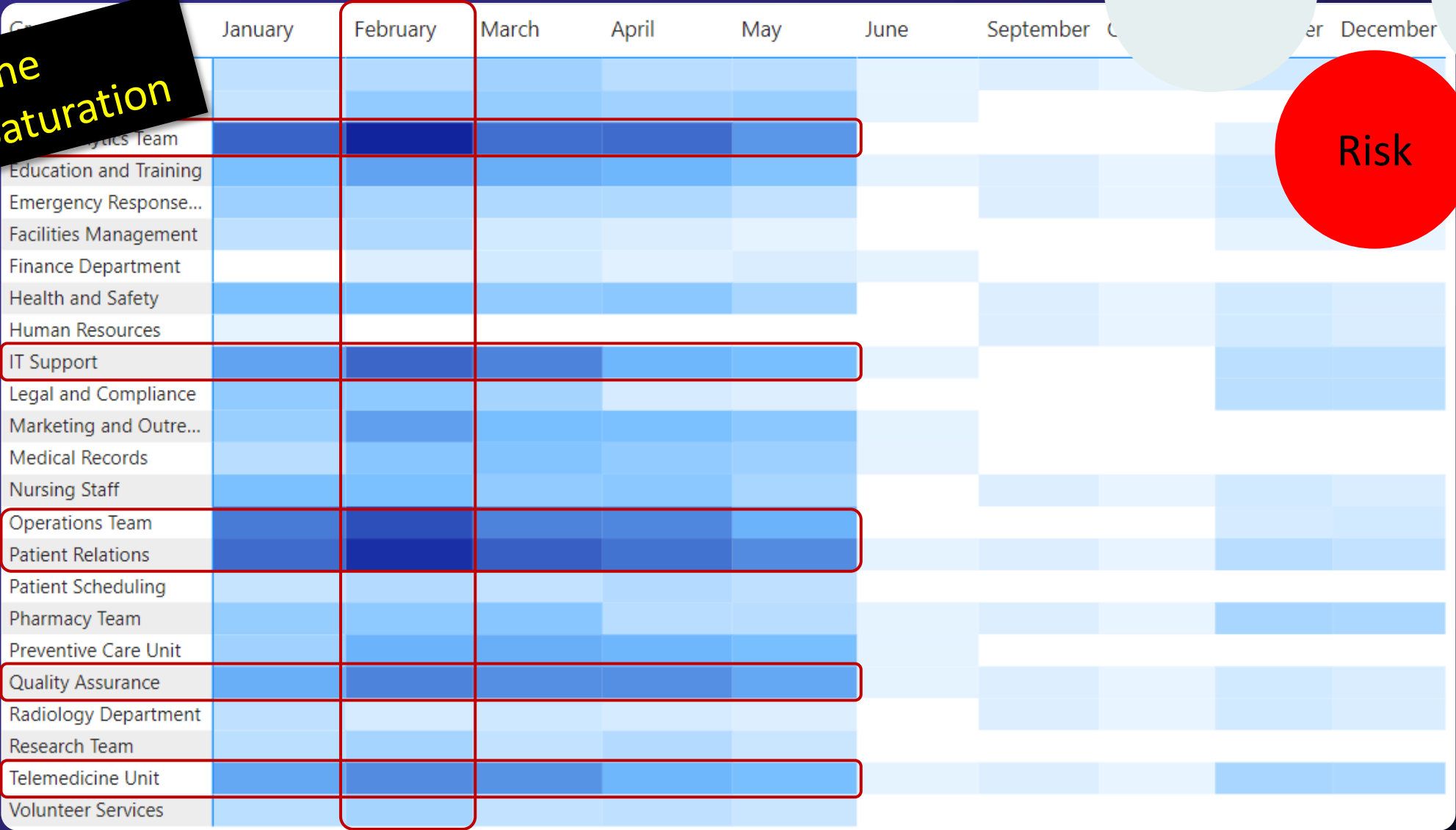
Resources

Rhythm



Aggregate Portfolio Impact

Manage the
Change Saturation

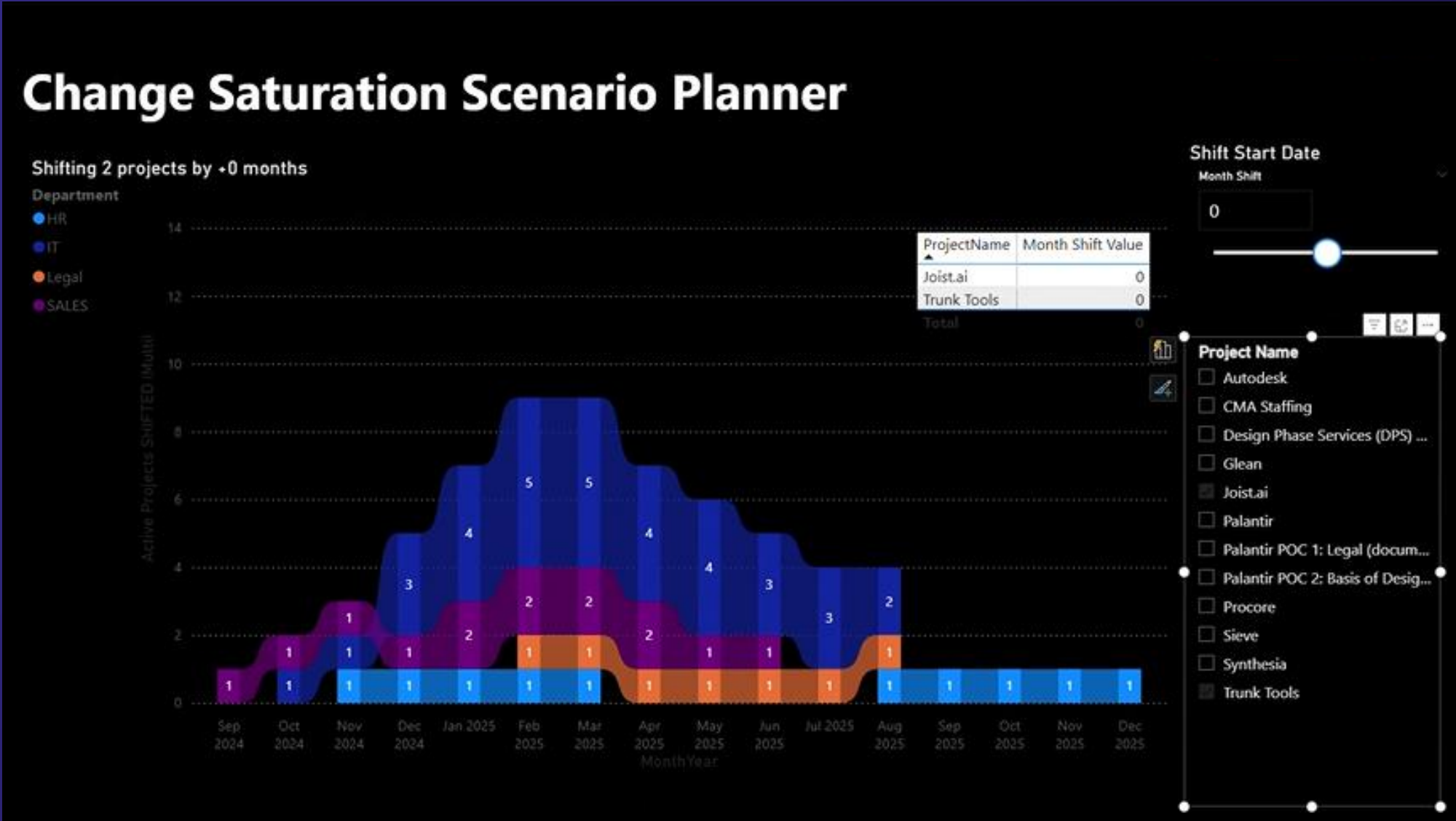


Resources

Rhythm

Risk

Manage and Optimize



Manage and Optimize

Financial Impact Visualizer



Change Saturation Planner - x

app.powerbi.com/groups/me/reports/b98edefa-d1d6-4105-ac01-2363e825d860/feef0cf1070002588075?experience=power-bi

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Change Portfolio Change Saturation Planner 1.8

Data updated 9/12/25

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🏠 Home

📄 Pages

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📄 Learn

📄 Real-Time

📄 Workloads

📄 Workspaces

👤 My workspace

📄 Change Portfolio ...

⋮

📄 Power BI

🔍 Filters

Change Saturation Planner

Shifting 2 projects by +0 months

Department

● HR

● IT

● LEGAL

● MARKETING

● SALES

Active Projects SHIFTED (Multi)

Sep 2024

Oct 2024

Nov 2024

Dec 2024

Jan 2025

Feb 2025

Mar 2025

Apr 2025

May 2025

Jun 2025

Jul 2025

Aug 2025

Sep 2025

Oct 2025

Nov 2025

Dec 2025

MonthYear

14

12

10

8

6

4

2

0

1

1

1

1

1

1

1

1

1

1

1

1

1

1

1

1

ProjectName

Month Shift Value

SaaS SSO

0

L&D Curriculum

0

Total

0

Shift Start Date

Month Shift

0

Project Name

☐ Cloud FinOps

☐ Data Lake Buildout

☐ ERP Upgrade

☒ L&D Curriculum

☐ Lead Scoring Model

☐ MDM Rollout

☐ Onboarding Revamp

☐ Partner Portal

☐ Quote Automation

☒ SaaS SSO

☐ Talent Analytics

☐ VDI Pilot

Rules

Optimize the Portfolio

Governance & Decision Making

What's most aligned with our Strategy?

What gets Funded?

What are the "must do's"?

What's in/out of the Portfolio?

What's authorized to proceed, and when?

Where's the Saturation? When, and for what groups?

Where are we at risk for poor adoption?

How can we *optimize* our portfolio?

How much is too much?

Complimentary 1-Hour Coaching Session with a Prosci Expert



Transform your portfolio outcomes with research-backed change expertise

- Are you looking for insights on how to apply change management to your initiative? After 30 years of research, we know that while technical excellence ensures successful implementation, change management amplifies and sustains your ROI.
- **Connect with a Prosci expert to:**
 - Discuss strategies tailored to your organization and initiative
 - Receive expert guidance and actionable insights
 - Learn proven approaches to change adoption that deliver measurable business outcomes.
- **Scan the QR code** to request your complimentary session.



Thank You!

Your Global Partner for Change Success

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Connect with me!