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3 Research-backed tactics to proactively manage change

Business disruption has reached an all-time high, placing project teams who are responsible for managing, communicating, and implementing change under intense scrutiny and pressure.



92%

of PPM professionals indicate that adapting to change remains a significant struggle.

We surveyed more than 1,400 project and portfolio management (PPM) professionals to learn more about the struggles they face when navigating disruption, and discovered that 87% agree that their team would be more effective if they were better equipped to anticipate change instead of reacting to it.

We also uncovered and are sharing specific tactics teams can use to proactively adapt and deliver successful, impactful projects at scale.

1 Communicate openly and often

Survey respondents cite lack of effective communication and collaboration as the #1 issue preventing them from effectively adapting to change. Unexpected change often triggers uncertainty among employees, harming productivity and engagement while also making it difficult to align around shifting priorities.

The top 3 adverse effects of change:

1. Productivity (**58%**)
2. Employee engagement (**54%**)
3. Shifting strategy (**52%**)

Take these steps to better communicate change today:

- [ ] Share the rationale behind each change, as well as the expected impact it will have on each team. This also requires defining the desired outcomes or success metrics.
- [ ] Centralize all communication channels and ensure leadership is sharing the same message. Consistency is key to avoiding confusion and keeping teams in lock step.
- [ ] Don't just communicate — collaborate. Give employees a designated space or forum to ask questions, provide suggestions, express concerns, and offer feedback.

2 Balance flexibility and standardization

PPM professionals rank standardization and flexible processes as equally critical to responding effectively to change. Striking the right balance between the two varies depending on the specific project, goal, or client. However, this requires putting a work management system in place that empowers teams to develop innovative ways to tackle disruption, as well as execute changes quickly and at scale.

42%

of PPM professionals rate standardization and flexibility as "very helpful" for responding effectively to project and portfolio changes.

Standardization

- [ ] Centralized demand intake
- [ ] Project templates
- [ ] Work statuses
- [ ] Automated workflows
- [ ] Prioritization models
- [ ] Role-based reporting

Flexibility

- [ ] Real-time alerts
- [ ] Easy project reassignment
- [ ] Multiple work views (Gantt, etc.)
- [ ] Hybrid methodology support
- [ ] Custom work applications
- [ ] Dynamic dashboards

3 Provide organization-wide visibility

Two-thirds of respondents report they lack insight into the data they need to pivot effectively when change happens. However, executives are nearly 2x as likely as individual contributors to say they "always" have the visibility necessary to anticipate disruption and make subsequently effective decisions. This leaves the majority of employees feeling out of the loop, leading to lack of accountability and making successful change management more difficult.

1 in 3

PPM professionals don't have visibility into the data they need to enact change in a timely and effective fashion.

Start enhancing organization-wide transparency:

- [ ] Ensure all work ties back to larger company goals, especially as they shift. Teams will see the bigger picture and how their work adds value, fostering ownership and engagement.
- [ ] Integrate company-wide systems of record to automate data aggregation and reporting. This way teams are always looking at the most complete and up-to-date information available.
- [ ] Build dynamic, role-based dashboards and reports to ensure everyone has access to the insights they need to proactively make smarter decisions — without exposing any sensitive data.

Stay a step ahead of change

Whether you're responsible for managing, communicating, or implementing change at the departmental or enterprise level, Smartsheet has the resources you need to proactively navigate business disruption:

Learn more about managing enterprise-wide change.

smartsheet.com/enterprise-pmo

Learn more about managing change at the departmental level.

smartsheet.com/business-pmo