

# USING PROJECT MANAGEMENT TO DRIVE ORGANIZATIONAL CHANGE<sup>1</sup>

Harold Kerzner, Ph.D. and Al Zeitoun, Ph.D.

## INTRODUCTION ---

What every company realizes eventually is that organizational change is inevitable. The question is; when will it happen and how long will it take to implement the change? Some changes are reasonably small, and transformation can be done quickly. Other changes can flounder significantly and disrupt the workforce to the point where there exists significant resistance. Effective leadership and management of organizational changes can significantly improve the organization's ability to successfully adapt to the change and lead to business growth.

For years, leadership and management for organizational changes were primarily the responsibility of senior management. Today, this has changed. Companies believe that they are now managing their business by projects and project management is one of the four or five strategic career paths for corporate growth. Project teams are now actively involved in business decision-making whereas previously it was mainly technical decision-making. Project management is now being recognized as an effective contributor and participant in organizational change management.

## UNDERSTANDING ORGANIZATIONAL CHANGE MANAGEMENT ---

We will begin with an understanding of the definition and need for organizational change management, (OCM). OCM is a structured approach whereby an organization transitions from the current way of doing business to a new approach which may be continuously changing. The structured approach can require individuals, project teams, organizational units, and even the entire company to adapt to environmental changes. The changes needed can impact technologies, tools, processes, corporate business models and corporate/project cultures.

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Some of the factors that drive the need for OCM include:

- Market shifts
- Use of new technology
- New organizational leadership with new goals and objectives
- Changes in customer demands
- Need for new or updated business models
- New legislation mandates
- Mergers and new partnership arrangements
- Changes in the enterprise environmental factors
- Changes in the enterprise environmental risks

Some changes can be made quickly or over time, especially if the changes are small. These are referred to as adaptive changes. Larger changes, which can require a significant number of resources, are called transformational changes and may take a great amount of time because of the potential shift in business strategies that can result in major disruptions to the core businesses.

Organizational change management is most often referred to as a structured process because there are numerous changes possible between adaptive and transformational changes, and the management of all of the changes must have some degree of structure in the way they are managed. The structured process helps managers and OCM leaders determine the people necessary for the OCM team.

## **UNDERSTANDING ORGANIZATIONAL CHANGE LEADERSHIP** \_\_\_\_\_

To fully understand the importance of organizational change requires an understanding of the differences between organizational change leadership (OCL) and organizational change management (OCM).

- **Organizational change leadership:** Leadership is generally “directional” whereby senior management identifies the need for the transformation, the expected or desired outcome, the impact on the business and assignment of critical resources. Leadership also provides continuous visible support and encouragement for the transformation needed.
- **Organizational change management:** Management is generally “tactical or operational” and focuses on the detailed processes, tools and techniques needed to manage the transition. Management also interacts frequently with the team to encourage their support and help overcome issues and possible fears.

Organizational change leadership requires that senior management act differently than when they are simply overseeing functional units when organizational changes are not

taking place. The literature identifies three roles with the titles provided below that senior management must perform as part of their participation in organizational change leadership:

- **Agitator:** In this role, the leader spends significant time listening to grievances, frustrations, and challenges impacting the workforce and stakeholders. The agitator then acts as a disrupter by bringing the issues to the surface, making everyone aware of the issues and the need for change, and mobilizing a team to take action and identify solutions.
- **Innovator:** After the leader functions as an agitator and understands the challenges and grievances, the next step is for the leader to become an innovator and identify solutions that are aligned with strategic goals and objectives. Part of the innovator's planning responsibilities is to be aware of potential negative implications that may result from the path desired and address them in the most efficient and effective way possible.
- **Orchestrator:** The orchestrator takes the innovator's plan and coordinates the necessary activities needed for adoption and understanding across the organization to solicit approval of the proposed solution. This is to ensure that the functional units understand the expected milestones, the activities for which they have responsibility, and the risks.

Successful change management leaders find it necessary to fulfill all three roles.

## THE ROLE OF PROJECT MANAGEMENT PRACTICES \_\_\_\_\_

One of the most significant challenges facing the orchestrator is deciding who should take the lead in the daily management of the OCM activities. In the early years of OCM activities, either senior management or functional units which were most affected by the changes would assume OCM responsibility. The difficulty was that the units assigned to the OCM responsibilities often had limited knowledge of project management but were selected primarily to correctly manage technical updates needed such as the installation of new equipment or software.

In the early years of change management activities, even though some form of project management may have been applied, minimal attention was given to the workers to help overcome their fears, grievances and resistance to the impact the changes would have upon their performance. Most workers generally disliked being removed from their comfort zones. Managers who supervised the workers on a day-to-day basis had responsibility to help them overcome their problems and issues.

Project management leadership and the importance of good interpersonal skills were not of primary importance in the early years of project management. Project managers were mainly assigned temporarily based upon their technical knowledge rather than leadership or management abilities. Project managers negotiated with functional managers for deliverables rather than people. Functional managers conducted team member performance reviews and were expected to provide the proper leadership of the workforce when assigned to projects. If workers were not performing as expected, the project managers reported the information to the functional managers who were expected to act and help their assigned resources manage unexpected situations.

As project management evolved, the importance of good interpersonal skills became apparent to effectively engage workers at the start of a project as well as through the complete project lifecycle. Some of the core management skills now being taught to project managers include:

- The need for continuous collaboration and communication
- Attention to details
- Encouraging team members to accept ownership and accountability
- Helping team visualize the changes needed (provide a clear vision)
- Active listening
- Ways to overcome lack of clarity
- Use of emotional intelligence skills
- Risk management
- Conflict resolution
- Ways to overcome resistance to change
- Problem solving and decision-making
- Ways to delegate effectively

Project managers now being assigned to OCM activities possess most of these skills. OCM now helps both individuals and organizational units much better than in the past to adapt to changes needed, especially when the changes may have intimidating effects initially.

## **THE CHANGING ROLE FOR OCL** \_\_\_\_\_

Simply because executives understand their responsibilities in OCL does not necessarily imply that they will provide the correct leadership and support. People assigned to OCL roles rather than OCM roles worked mainly behind the scenes as sponsors and coaches, relying heavily upon the managers to handle both technical problems and people issues. The leaders traditionally focused heavily on the expected business outcomes rather than the impact that the changes might have on the workforce. For some executives, there

might also be fear that a failed organizational change effort may result in budget overruns, delays, and a reduction in quality. This could damage their career plans. Staying behind the scenes may be best.

Today's organizational change leaders are much more active than their predecessors because they have a better understanding of project management and how it can make their job easier as leaders. Organizational change leaders today are functioning on the front lines as visible sponsors with a willingness to participate. Organizational change sponsors are now developing coalitions with other sponsors that may be impacted by the expected changes. Leaders are now recognizing that organizational change success most often mandates a change in the organization's culture, and the leaders are the architects of the new culture which is designed to support all forms of project management as well.

Visible OCL on the front lines significantly helps gain workforce support and minimize disruptions. The degree of visibility is most frequently based upon the risk of the changes desired.

## THE IMPACT OF PROJECT MANAGEMENT

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As stated previously, perhaps the biggest challenge facing companies embarking on organizational change efforts is when organizational change leaders and managers resist visible sponsorship roles and prefer to remain behind the scenes for fear of poorly managed organizational changes that could lead to possible failure. The growth and acceptance of modern project management practices have significantly increased the chance of organizational change success and provided leaders and managers with a new outlook on fulfilling their roles. Perhaps the biggest benefit is better alignment of changes to the new business strategies and objectives.

To get workers to accept the changes and think and act differently, leaders and managers must recognize that both project management and organizational change transitions have now become **people centered**. Successfully influencing workers to change must be done through interpersonal skills that focus on building trust rather than through formal authority, seniority or titles. This helps create a culture that promotes the acceptance of changes.

The 8<sup>th</sup> edition of the PMBOK® Guide has several sections devoted to resilience. Resilience refers to the ability of a project and its team to adapt, recover, and maintain stability when faced with unexpected changes that can occur on a regular basis and that can impact on their objectives, deadlines, and how they perform their work. Removing people from their comfort zone and sense of equilibrium can lead to negative consequences if not managed effectively.

Resilience requires understanding how people are impacted by changes and creates a framework for resilience management. Resilience practices are today part of effective OCM and OCL practices and include:

- Being proactive and anticipating changes and accompanying risks
- Being willing to adjust or change the original project plan if necessary
- Engaging team members using collaboration practices to address issues rapidly
- Using collaboration and open communication to build trust
- Maintaining a positive mindset that changes in a project's direction can be positive rather than negative and may provide opportunities
- Managing your personal stress and emotions effectively as a guide for others

Resilient project managers understand the benefits of a good corporate and project team culture that is adaptable, flexible, and able to guide their teams through complex situations, ensuring the project's success despite obstacles. Good cultures support a project team's resilience efforts to overcome challenges, setbacks, or crises. Good cultures support staying productive and moving forward despite adversity resulting from technical issues, risks, or interpersonal problems.

## **THE PATH FORWARD**

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Organizational change is here to stay. Transformation is becoming an organizational beat. Whether leaders are dealing with intermediate, less complex changes, or longer-term strategic change, this requires the use of the right structured change process, coupled by the proper level of supporting leadership. In this article we have covered the core focus of both OCM and OCL. The challenge ahead requires sharpening the visible leadership qualities necessary for achieve the success of transformation and sustainable change.

As highlighted in Figure 1, there are six capability ingredients that project stakeholders should consider building to empower organizational change success. This is essential in order to exemplify the behaviors and practices across the organization that would have to exist in the organization end-to-end in supporting the change journey. These ingredients could be thought of as the organizational change readiness recipe.



**Figure 1 – Organizational Change Readiness Ingredients**

- With the clarity of change drivers, there is a higher likelihood that organizational stakeholders are focused on the right initiatives and efforts in support of the change
- Understanding the distinct difference between OCM and OCL is key to decide where the integration needs to take place. This will solve a number of the leadership challenges highlight above and clarifies the roles and responsibilities across the change team
- Given the change lifecycle, there are multitude of roles that leaders should play: agitator, innovator, and ultimately orchestrator. This requires building the right type of change leaders and the commitment of the organization to growing these leaders
- The evolving project management skills continue to be clear enablers for change and the merging of project management and change management skills is becoming an obvious reality that will strengthen the achievement of change value
- Resilience muscles have increased in value over the years. With the continual organizational changes and the strategic ongoing transformations, resiliency should be imbedded in the skills of every stakeholder and the right supportive culture should be created by the executives
- Leadership should be strategically aligned on the change mission. The behaviors they cascade and the message they send across the organizational ecosystem carry a high weight in ensuring that the change process runs smoothly

In addition, it is important to start having the critical future conversation about the right host of organizational change ownership. The thought in question is whether a classical Project Management Office (PMO) would be sufficient for achieving and sustaining the value of organizational change or do organizations need to invest in a Transformation Management Office (TMO). The question might evolve into a debate to consider if this distinction is a true structural enabler, or is it merely a branding exercise to get the right leadership attention and commitment to the change journey.

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## About the Authors



### **Harold Kerzner, Ph.D., MS, M.B.A**

Senior Executive Director for Project Management  
International Institute of Learning  
New York & California, USA



**Dr. Harold Kerzner** is Senior Executive Director for Project Management for the International Institute for Learning (IIL). He has an MS and Ph.D. in Aeronautical and Astronautical Engineering from the University of Illinois and an MBA from Utah State University. He is a prior Air Force Officer and spent several years at Morton-Thiokol in project management. He taught engineering at the University of Illinois and business administration at Utah State University, and for 38 years taught project management at Baldwin-Wallace University. He has published or presented numerous engineering and business papers and has had published more than 60 college textbooks/workbooks on project management, including later editions. Some of his books are (1) Project Management: A Systems Approach to Planning, Scheduling and Controlling; (2) Project Management Metrics, KPIs and Dashboards, (3) Project Management Case Studies, (4) Project Management Best Practices: Achieving Global Excellence, (5) PM 2.0: The Future of Project Management, (6) Using the Project Management Maturity Model, and (7) Innovation Project Management.

He is a charter member of the Northeast Ohio PMI Chapter.

Dr. Kerzner has traveled around the world conducting project management lectures for PMI Chapters and companies in Japan, China, Russia, Brazil, Singapore, Korea, South Africa, Canada, Ireland, Germany, Spain, Belgium, Poland, Croatia, Mexico, Trinidad, Barbados, The Netherlands, Sweden, Finland, Venezuela, Columbia, United Arab Emirates, France, Italy, England, and Switzerland. He delivered a keynote speech at a PMI Global Congress on the future of project management.

His recognitions include:

- The University of Illinois granted Dr. Kerzner a Distinguished Recent Alumni Award in 1981 for his contributions to the field of project management.
- Utah State University provided Dr. Kerzner with the 1998 Distinguished Service Award for his contributions to the field of project management.

- The Northeast Ohio Chapter of the Project Management Institute gives out the Kerzner Award once a year to one project manager in Northeast Ohio that has demonstrated excellence in project management. They also give out a second Kerzner Award for project of the year in Northeast Ohio.
- The Project Management Institute (National Organization) in cooperation with IIL has initiated the Kerzner International Project Manager of the Year Award given to one project manager yearly anywhere in the world that demonstrated excellence in project management.
- The Project Management Institute also gives out four scholarships each year in Dr. Kerzner's name for graduate studies in project management.
- Baldwin-Wallace University has instituted the Kerzner Distinguished Lecturer Series in project management.
- The Italian Institute of Project Management presented Dr. Kerzner with the 2019 International ISIPM Award for his contributions to the field of project management.

Dr. Harold Kerzner can be contacted at [hkerzner@hotmail.com](mailto:hkerzner@hotmail.com)



### **Dr. Al Zeitoun, PgMP, PMI Fellow**

System Thinker & Transformation Advisor  
Maryland USA



**Dr. Al Zeitoun** is a Future of Work, business optimization, and operational performance excellence thought leader with global experiences in strategy execution. His experiences encompass leading organizations; delivering their Enterprise Digital and Business Transformation; guiding fitting frameworks implementations; and using his empathy, engineering insights, and collaboration strengths to successfully envision new business models and execute complex missions across diverse cultures globally.

In his recent role with Siemens, he was a Senior Director of Strategy responsible for driving the global program management practices, Master Plan governance, and enabling the Strategy Transformation processes and priorities.

In his position, as the Executive Director for Emirates Nuclear Energy Corporation, Abu Dhabi, UAE, he was responsible for creating the strategy execution framework, achieving transformation benefits, governance excellence, and creating the data analytics discipline necessary for delivering on the \$40B complex country energy mission roadmap.

At the McLean, USA HQ of Booz Allen Hamilton, Dr. Zeitoun strategically envisioned and customized digitally enabled EPMO advisory, mapped playbooks, and capability development for clients' Billions of Dollars strategic initiatives. Furthermore, he led the firm's Middle East North Africa Portfolio Management and Agile Governance Solutions.

With the International Institute of Learning, Dr. Zeitoun played a senior leader and global trainer and coach. He was instrumental in driving its global expansions, thought leadership, and operational excellence methodology to sense and shape dynamic ways of working across organizations worldwide. He speaks English, Arabic, and German and enjoys good food, travel, and volunteering. Dr. Al Zeitoun can be contacted at [zeitounstrategy@gmail.com](mailto:zeitounstrategy@gmail.com)