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Transformation, the elephant in the project management office

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Seeing the Elephant: A Framework for Transformation

Leaders like to talk about “transformation”. But if you ask “N” executives what it means, you’ll get “N+1” different answers: reorganization, headcount reduction, culture change, training, technology, etc., etc.

It’s the story of the group of blind wise men describing an elephant: each one touches a different part and concludes something different about the elephant. Transformation looks different to everybody.

The Triggers — What Sets Transformation in Motion

It's instructive to begin with root causes: why do organizations undertake transformation programs? They usually begin with an event that will have a major impact on an organization: a merger, acquisition, divestiture, carve-out, or internal restructuring. Each creates a different starting point and objective (Table 1).

Trigger for organizational change	Starting entities	Entity of interest	Objective of the reorganization
Mergers	A merges with B	C (=A+B)	<ul style="list-style-type: none"> ▪ Lock in or exploit acquired capabilities ▪ Lock in or exploit acquired customers, assets ▪ Capture economies of scale and scope ▪ Eliminate competition ▪ Consolidate market presence
Acquisitions	A acquires B	A (=A+B)	<ul style="list-style-type: none"> ▪ Lock in or exploit acquired capabilities ▪ Lock in or exploit acquired customers, assets ▪ Capture economies of scale and scope ▪ Eliminate competition ▪ Consolidate market presence
Divestitures	A+B divests B	A	<ul style="list-style-type: none"> ▪ Focus on core competencies ▪ Lock in lower operating costs ▪ Spin-off underperforming lines of business
Carve-outs (acquirer perspective)	A+B divests B	B	<ul style="list-style-type: none"> ▪ Acquire operations to roll-up into a platform ▪ Turn-around a viable business ▪ Flip repackaged assets to more suitable owner
Internal restructuring	A re-organizes internally	A	<ul style="list-style-type: none"> ▪ Improve effectiveness of existing resources ▪ Capture economies of scale and scope ▪ Re-align resources to new strategic priorities ▪ Build capabilities (individual-centric) ▪ Incorporate new technologies ▪ Strengthen alignment, responsiveness, control

Table 1: Triggers for organizational change that initiate transformations

The Imperatives — Where Leadership Must Focus

Behind every structural change lies a leadership challenge: How do you keep the organization motivated and aligned while everything is changing?

Table 2 provides some examples of imperatives and challenges that executives and investors face when undertaking organizational change.

Transformation isn't just structural. It has to do with culture, alignment, capabilities, and leadership focus. Tackling the different types of transformation requires many diverse methods and tools.

Trigger for transformation	Typical expected outcome	Transformation imperative	Typical leadership challenge
Mergers	Integration of "equals"	Combine cultures and capabilities without losing speed	Ensure conversion to one culture and alignment to one strategy
Acquisitions	Grow or strengthen	Integrate incoming culture and capabilities without losing focus or continuity	Maintain momentum
Divestitures	Refocus on core	Maintain continuity amid separation	Rebuild autonomy and accountability
Carve-outs (acquirer perspective)	Financial restructuring	Restore capabilities and re-energize the business model for re-sale	Convert economic potential into investor returns
Internal restructuring	Strategy pivot or stagnation	Redesign to reflect new priorities	Maintain moral and energy

Table 2: Examples of imperatives and challenges of transformation programs

The Methodologies — How Change Really Happens

The transformation toolbox has five types of methodology tools (Table 3). They’re often used in combination, but rarely are ALL of them used at the same time for a single transformation program.

For example:

- A merger might **restructure** delivery models while **realigning** culture.
- A divestiture may **rationalize** costs and **rebuild** lost capabilities.
- An internal transformation may aim to **rationalize** (cut costs) and to **build** (or shore up) **capabilities**.

Examples of transformation methodologies				
RATIONALIZE Trim what’s redundant or misaligned.	RESTRUCTURE Redraw how work gets done	REALIGN Reset the social contract and energy of the culture	REBUILD Invest in people, skills, and engagement	REINFORCE Embed governance and performance feedback loops
<ul style="list-style-type: none"> • Match competencies to strategy 	<ul style="list-style-type: none"> • Realign vertical to horizontal 	<ul style="list-style-type: none"> • Clarify strategy for the business 	<ul style="list-style-type: none"> • Train, coach; exec. education; certifications 	<ul style="list-style-type: none"> • Implement KPIs, reporting
<ul style="list-style-type: none"> • Zero-based or benchmark staffing allocation 	<ul style="list-style-type: none"> • Formalize communities of excellence 	<ul style="list-style-type: none"> • Define vision, mission for organizationn 	<ul style="list-style-type: none"> • Insitute career path planning 	<ul style="list-style-type: none"> • System of comms, deleg'n, decisions, accountability
<ul style="list-style-type: none"> • Reallocate most capable resources 	<ul style="list-style-type: none"> • Build centers of excellence 	<ul style="list-style-type: none"> • Manage change as a program 	<ul style="list-style-type: none"> • Rotate roles, apprenticeships 	<ul style="list-style-type: none"> • Define account-abilities per KPI
<ul style="list-style-type: none"> • Train, redeploy, or outplace resources 	<ul style="list-style-type: none"> • Rebuild customer service or delivery model 	<ul style="list-style-type: none"> • Drive culture using workshops, training • Restructure incentives 	<ul style="list-style-type: none"> • Institute mentorship program 	<ul style="list-style-type: none"> • Upgrade policies, procedures, structure • Implement cont. improvement program

Table 3: Types of methodologies in the transformation toolkit.

Why not throw all of the tools in the toolbox into the transformation program at once? It would be overwhelming and ultimately counterproductive. In addition:

- Transformation programs are fit for purpose; not all methods are needed to address the issues in tables 1 and 2.
- Transformation is expensive in terms of cost, disruption to operations, and management distraction. A tailored, surgical approach generates a higher ROI.
- Transformation takes time, so it is important to achieve a set of high priority goals with measurable outcomes within a reasonable time frame that corresponds to fiscal cycles and management attention spans.
- Outcomes measured against specific, discrete targets are easier to validate.

Seeing the Whole Elephant

Transformation is the holistic application of many methods. In our experience, transformations succeed when a number of conditions are met, conditions that make the tools work in harmony to achieve one targeted outcome.

Below are just some of the key success criteria. What works for any organization depends on the nature of the situation and the skills of the leadership driving it.

- Execution expertise: the team leading the change have the experience to adapt their methodologies to the constraints and maturity and culture of the organization.
- Project management office: An effective and experienced PMO team is essential to capture and track all of the moving parts of the transformation process. This also includes setting clear expectations for participants as to what inputs they need to provide to populate and update the tools that are in use: project management software, organization charts, resource tables, communications plans, etc.
- The organization's leadership is able to articulate a consistent vision for the end-state as well as the roadmap for getting there.

Closing thoughts

“Transformation” means a lot of things to different people. This is because it is actually a tool set that can be used in varied situations and to drive varied outcomes. In practice, transformations draw heavily from a range of methodologies, but do not use all methodologies in one program.

Like the blind wise men touching an elephant’s parts, the term “transformation” means something different to everyone. In fact, transformation is a set of tools that can be used to solve a lot of different problems, and which tools you choose to use depends on the problems you’re trying to solve.

Authorship

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△ EBITDA

Why should I read this article?

If you're involved in a transformation process, this article may suggest ways to refine the scope or improve the focus of the program.

The tables that map Transformation Methodologies to individual Triggers for Organizational Change may serve as a checklist of workstreams to incorporate in your program.

Hashtags

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Header

Transformation means something different to everyone. In this article, we identify typical triggers and objectives for transformation programs, and break the concept of transformation into 5 types of methodology tool sets.

Image

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