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| **Organizational Change Management Plan** |

**Document Information**

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| **Project Manager** |  | **Estimated Budget** |  |
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Template Guide

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**What is an organizational change management plan?**

The organizational change management (OCM) plan describes the objectives, strategy and tools needed to support stakeholders in the transition to adopting the product of a project with minimal disruption.

**Why create an organizational change management plan?**

Most projects require some type of organizational or behavioral change. Organizational change management practices are proven to help people affected by change embrace new technology and practices. The application of OCM strategy and techniques throughout the project improves system adoption by stakeholders and helps organizations achieve the benefits of new systems sooner. The OCM plan should be used when the expected impact of the change brought by a project will affect people, processes, and technology.

**How to use this template**

This template provides a guide for project managers to develop an OCM plan for new technology and/or business system projects. Additional sections may be added or removed according to the specific business circumstance and need. Sample tables and charts have been included to provide tips on how to complete each section.

*Italicized instructions are included throughout this template to explain the purpose of each section and how to complete it.* ***These should be deleted from the final document.***

# Organizational Change Management Plan Overview

*[This section summarizes the purpose of the OCM plan and its overall goals and objectives.]*

## Purpose

The role of OCM plan within a project is to help plan for and manage the people side of the project. OCM focuses on identifying, preparing and managing a wide array of internal and external stakeholders, employees and customers that will be impacted by the new solution. We want those stakeholders to feel informed, prepared, trained and ready to participate in a successful implementation. We want employees to adopt new skills and develop new capabilities and to value and appreciate the features that our new technology offers.

The purpose of OCM is to effectively plan and transition the organization to the desired future state. The purpose of the OCM Plan includes:

* Assessing the project’s impact to the organization.
* Assessing the readiness of the user organizations and individual users to accept changes to working environments.
* Identifying, describing and planning for necessary actions to facilitate those changes.
* Reducing resistance to change using various communication tools.
* Reducing overall impact to operations.

## OCM Objectives

Our objectives include:

* Increase awareness and buy-in on the part of internal and external stakeholders.
* Broad-based readiness to implement the necessary business and system changes.
* Successful adoption and high utilization rates of new software and business processes.
* Meet budget and schedule expectations, while assigning enough of the right-skilled resources to be successful with OCM.

Our key tasks will be iterative in nature, repeated many times over the life of the project, and include:

1. Stakeholder identification, analysis and planning.
2. Communication planning and execution.
3. Readiness assessment activities.
4. Training, mentoring and coaching in OCM principles.
5. Knowledge transfer support.

## Project Vision

*[This section documents the current and future state. The future state supports the vision of the project’s objectives and why the change is necessary.]*

## Current “As Is” State

*[This section describes the current state of the organization involved in the change. Include business and operational processes impacted by the project.]*

## Future “To Be” State

*[This section describes the to-be state of the changes. This includes business and operational processes.]*

# Stakeholder Identification and Analysis

*[Identify key project stakeholders and stakeholder groups, both internal and external to the project. It is important to identify all stakeholders supportive and not supportive of the implementation. By identifying who they are, what impact they have and whether they benefit or not from the project’s goals and objectives is important to managing perceptions, communications and change readiness. List the key stakeholders as they relate to organizational change management. Consider using the organizational change and communications stakeholder analysis workbook to make a table that includes the stakeholder name, awareness level (high, medium, low) and impact on the project.]*

| **Stakeholder/Stakeholder Group** | **Awareness** (High, Medium, Low) | **Impact on the Project**  |
| --- | --- | --- |
|  |  |  |

# OCM Team Structure and Responsibilities

*[This section describes the roles and identifies the people responsible for managing change on the project. Consider change support during implementation and after go live, such as command center/help desk, etc. Also consider including an organizational chart.]*

The following represents the OCM team structure:

| **Role** | **Name** | **Responsibilities** |
| --- | --- | --- |
| **Change Sponsor** |  | Communicates the vision for organizational change. Leads by example. Is involved in initiating, managing, and implementing change. Works with people and ensures the right skill sets are in place at the right time. Keeps people focused and directed toward the end goal(s).  |
| **Readiness Manager** |  | Manages the organizational change message ensuring all OCM activities are satisfactorily accomplished. Is the main point of contact from a project perspective for organizational change.  |
| **Project Change Team Leader** |  | Manages the organizational change message vertically within their respective organization ensuring all project-related OCM activities are satisfactorily accomplished; manages the portion of the Project Schedule containing their activities, and reports activity status. |
| **Business Process Analyst** |  | Reviews and documents as-is and to-be business processes, creates organizational processes and procedures to support new technology implementations.  |
| **Trainer** |  | Develops training plan, materials and conducts training. |
| **End User Representative** |  | Listens to and asks questions related to organizational change. Participates in all levels of training as required, from technology familiarization to testing use-case driven scenarios. Tests redesigned and/or new organizational processes and procedures and supplies feedback.  |

# Scope

*[This section describes the scope and activities involved in the OCM plan.]*

## Scope Statement

[*This section describes what effort is in scope (e.g., training, training materials, communications plan, business process reengineering, job description, command center, etc.) for OCM to be effective*.]

## Activities by Project Phase

[*This section describes the high-level OCM tasks/activities that will take place*.]



### Initiation Phase

[*This section describes what activities take place during initiation of the project. For instance: Gain understanding of vision of project and impacts to organization. Host sponsor engagement session. Document initial feedback.]*

### Planning Phase

*[This section describes what activities will take place during planning phase of the project. For instance: Identify OCM resources, identify Readiness Teams, develop Surveys and checklists, develop performance measures, develop schedule, develop communications plans, and feedback strategy.]*

### Execution Phase

*[This section describes activities that will take place during execution of the project. For instance: Conduct and monitor readiness assessments, implement communication plans and risk assessments, and monitor schedule.]*

### Closeout Phase

*[This section describes closeout activities. For example: Document OCM closeout report, document lessons learned.]*

# Work Plan and Deliverables

*[This section describes the high-level work plan and deliverables for the OCM plan.*

| **Deliverable** | **Target Date** |
| --- | --- |
| 1. Vision statement/case for change.
 |  |
| 1. Stakeholder analysis and engagement plan.
 |  |
| 1. Communication plan.
 |  |
| 1. Readiness assessment (baseline).
 |  |
| 1. Feedback strategy.
 |  |
| 1. Readiness dashboard.
 |  |
| 1. Success metrics.
 |  |
| 1. Training/coaching and knowledge transfer plan.
 |  |
| 1. Go-live support plan.
 |  |
| 1. Post-implementation support plan.
 |  |

# Feedback Strategy

*[This section describes the plan for receiving feedback on the OCM activities.]*

# Training, Coaching and Knowledge Transfer Plan

*[This section describes the training, coaching and knowledge transfer plans for the project. It should include the approach and objectives. It may also include schedule, if known. A separate, more detailed plan could be developed later.]*

# Readiness Assessment Plans

*[This section describes the plans for assessing readiness prior to go-live. Items such as training complete, policies implemented, position descriptions complete, system configured, etc. The plan will include when readiness dashboard/checklist will be available, and how frequently it will be reported on, etc.]*

# Go-Live Support Plan

*[This section describes what go-live support will look like. For example, will a special command center need to be stood up? Will there be deskside support needed for end users? How will end users/customers report issues?]*

# Post-Implementation Support Plan

*[This section describes what post implementation support looks like. Who will customers/end users call for support, what can end user expect in response, etc.?]*

# Budget Considerations

*[This section should describe any budget considerations needed to support OCM including OCM consultants, training facilities and equipment, command center facilities and equipment, etc.)*

# Post Implementation Considerations

*[This section describes additional items the project may want to monitor post implementation to support overall vision of future to-be state.]*

# Risk Assessment

*[This section describes the risks assessed during the planning and mitigation strategies for addressing the risks. The risks identified here should be captured in overall project risk log.]*