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Change Management & Implementation Plan

Version X.X.X

Managing Business Analysis Services
By Barbara Davis, Author

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Version Control Log

Version #	Date	Author	Description of the Change

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1. Introduction

1.1 Intended Audience

The intended audience for this document is ...

1.2 How to Use This Document

It is intended that this document will serve as a point of reference and provide ...

1.3 Assumptions

- [Assumption 1]
- [Assumption 2]

1.4 Constraints

- [Constraint 1]
- [Constraint 2]

2. Inform

2.1 Vision Statement

[Vision Statement]

2.2 Project Contacts

Project Contacts:

    i.   [Main Point of Contact]
       a. Phone:
       b. Email:
   ii.   [Project Website URL]
       Site contents specific include:
       a. Vision Statement
       b. Point of Contact
       c. Escalation Procedure
       d. Project Communiqués
       e. Schedules
       f. Online Training Resources
       g. FAQ's about the new processes

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2.3   Communication Plan

Communication Type	Communication Purpose	Delivered By	Audience	Communication Format	Frequency
Identify the general descriptive title of the communication. See examples below:	*Describe the purpose of the communication.*	*Who on the team is responsible for delivering the communication?*	*Who will be receiving the communication?*	*Which format type is the communication delivered in? (There may be more than one type.) Use the Project Documentation checklist to identify if a specific template should be used.*	*How frequently is this type of communication required? List any specific days/times if known.*
Examples:					
Status Updates	*Inform of status of project activities*	*Project Team*	*Project Manager*	*Email, Use the Weekly Status Report Template*	*Weekly, Friday, 12:00 P.M.*
Review	*Discuss current progress and set weekly goals*	*Project Manager*	*Project Team*	*Meeting*	*Weekly, Monday, 9:00 A.M.*
Status Reports	*Inform of status of project activities*	*Project Manager*	*Client Project Manager, Project Sponsors*	*Email, Report*	*Weekly, Monday, 12:00 P.M.*
In Process Reviews (IPRs)	*Inform of status of project activities, provide updates to work plan, and provide performance reports*	*Project Manager*	*Steering Committee*	*PowerPoint Presentation, Report*	*Monthly, First Tuesday of the month, 10:00 A.M.*
Steering Committee Meetings	*Discuss issues and changes affecting project outcomes*	*Project Manager and selected Team Members*	*All*	*PowerPoint Presentation, Report*	*Semi-Monthly, Second and Fourth Tuesday, 10:00 A.M.*
Quality Review(s)	*Provide objective review of projects to ensure adherence to policies, processes, standards, and plans*	*QA Mgr*	*Project Manager*	*Report, Meeting, 1-on-1*	*Quarterly*

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3. Involving the Stakeholders and Teams

3.1 Phase I

Planning for the preliminary the meetings and information sessions.

3.1.1 Goal

To involve stakeholders and achieve a level of buy-in that will support the activities and transition of the project from a leadership perspective. (Workshops within this session are appropriate if applicable.)

3.1.2 Audience

Program managers, project managers and team leads responsible for ensuring the buy-in, adoption and ongoing compliance of their functional and project teams.

3.1.3 Invited Attendees

The following people will be invited to attend these initial rounds of training to support early adoption and evaluation of the training material. This will ensure that once sessions are run with the team members, the material is complete and easily digestible, and presented in a manner that renders it readily acceptable to the audience and participants.

3.1.4 Location

TBD

3.1.5 Equipment

[List any equipment such as projectors and laptops or project give-away items for this session]

3.1.6 Content

[Information for Session]

[Timeline/Project Schedule]

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3.1.6.1 Expected Participation

Participants will be asked to contribute to the discussions and to review the training materials and content and make recommendations for improvements to the materials and content prior to the training sessions with other groups and team members.

3.1.7 Session Task

Identify people within this group who seem obstinate or against the change as well as those with additional questions and seek to spend time with them in small groups or as individuals.

3.2 Phase II

Planning for the secondary set of meetings and information sessions.

4. Transitioning to the New Processes/Systems

4.1 Goal

To involve mainstream and achieve a base level of buy-in that will support the activities and transition of the project. (Workshops within this session are appropriate if applicable.)

4.2 Training

4.2.1 Training Package

Each training session will utilize elements and delivery mechanisms that appeal to multiple learning styles including tactile, auditory and visual. As a continuation of this, the sessions will provide packages for each participant that includes PowerPoint presentations, round-table discussions, hands-on exercises, hand-outs and job aids.

4.3 Training Plan

4.3.1 Invited Attendees

The invited attendees for these sessions include ...

4.3.2 Location

The training facility is to be ...

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4.3.3 Equipment:

[List any special equipment and access requirements]

4.3.4 Content & Scheduling

[List schedules and training]

4.3.5 Session Task

Identify people within this group who seem obstinate or against the change as well as those with additional questions and seek to spend time with them in small groups.

5. Observing and Monitoring Implementation Progress

[Identify and log key metrics and milestones for success and progress in during the development and implementation of a new system.]

6. Ownership, Responsibility & Accountability

[Identify and log key owners, responsible and accountable groups for providing ongoing support, and controlling changes to the new system/process after implementation of a new system. TIP: Provide functional role vs. naming a specific individual as this typically changes less often and is associated to the role not the person.]

Functional Role:	Business Unit:	Held By:	Contact Info:	Respon sible	Account able	Contri butes	Infor- med

7. Responding to Requests for Information (RFI)

7.1 Project Communication Policy

The following represents the basic project communication policy for managing communications with the various teams.

    i.   Main Contact Person:
    ii.   Response times: The standard response times will be as follows:
        a.   Acknowledgement –

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     b.   Provision of the requested information –
     c.   Closure of request –
  iii.   Response formats: Response formats will be the same as the incoming formats with follow-up via email to confirm details or report requested information.

7.2   Automatic Response Emails

Automatic response emails [will/will not] be utilized for this initiative.

7.3   Project Email Account

A generic open project email account for people to submit general comments and concerns to the project team [will/will not] be utilized for this initiative.

8. Sustaining the Changes

8.1   Human Resources

[Recruitment strategies and systems (if applicable)]

[On-going Training]

[New resource orientation (if applicable)]

8.2   Management Systems

[How do they reflect the new culture]

8.3   Physical Structure

[Identify new physical requirements for maintenance of the new system (e.g. increased workspace)]

[On-going Issue Management]

[On-going Asset Management]

9. References