PROJECT NAME HERE

Change Management Proposal

By: Name, Title

Department

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| **A note about the template.** This document serves two purposes. It provides the author with a framework to define the change management strategy and the change management communications plan. In addition, once completed the document provides the reader with a clear picture of the change, the steps that will be taken to increase project success, the potential cost of the project along with the timelines for implementation.The author:* This template is intended to support the author in defining the change management strategy and change management communication plan.
* The document helps to define roles and responsibilities and outline where resources will be focused.
* Section headings are optional.
* Blue boxes provide guidelines or suggestions for content.

The reader:* Once complete the document will provide the reader with clear insight into the proposed change addressing:
	+ What the change is.
	+ Why the change is needed.
	+ The benefits to implementing the change.
	+ Proposed actions that will be taken to support stakeholders through the change journey.
	+ Communication efforts that will be employed throughout the change.
	+ The timelines of change activities.
	+ Expectations regarding roles and responsibilities
	+ Insight into the resources required to implement the change
	+ Activities that will be employed post change implementation.
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# Project overview:

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| **In this section consider defining**:* Who the target audience is for this document?
* What are the business reasons for using change management?
* What success will look like

**Also consider including:*** What the project is
* The benefits of the change
* Why the change is needed
* The nature of the change
	+ Is this a small, medium or large change?
	+ How quickly the change is being applied
	+ Is this one change or part of a series of changes?
* Who will be impacted by the change?
* Hany stakeholders will be impacted
* What the risks are if the change is not implemented
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# Project objective:

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| **In this section consider defining**:* the proposed objective of the change
* what the future state looks like
* What success will look like i.e., how will success be measured?
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# Current state:

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| **In this section consider defining**:* What the current state looks like and the challenges / gaps to address.
* How much change ready stakeholders are i.e., how much change have they already experienced?
* How stakeholders are likely to react to the change i.e., was the stakeholders past experience a positive one or a negative one? If the latter, what insights have you gained to increase user adoption?
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# Change Management approach:

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| **In this section consider defining**:* The current state and the future desired state.
* The steps that will be taken to achieve the desired future state including information / evidence / data gathering.
* Who will you rely on to facilitate the change?
* How you will identify where resistance exists and the activities you propose to employ to minimize this reaction.
* The activities and timelines you intend to take for each step of the change management strategy/
	+ If applicable, align timelines with Project Management. Ie if applying the Prosci ADKAR model, define when the focus will be on awareness building, when there will be a shift to desire, knowledge, ability and reinforcement.
	+ How you will measure success of each stage of the CM strategy?
* The measures of success for the overall change initiative
	+ How will you know you have succeeded in meeting project objectives?
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# Key roles / resources

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| **In this section consider defining:*** The resources (employee and / or $) you will need to roll out the change
* The key roles who will be integral to the success of the change initiative:
	+ The sponsor
	+ The change leader
	+ The change team
	+ Subject matter experts
	+ The project manager (if applicable)
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# Change Management proposed schedule of activities:

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| Capture a timeline of activities you will be undertaking. For example: if applying the Prosci ADKAR model consider when you will: * Build **Awareness**
* Build **Desire**
* Offer training (**Knowledge** & **Ability**)
* Implement and **Reinforce** the change

NB If applicable, align activities with milestones defined in the Project Management plan. |

# Change Management Communications plan

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| **In this section consider defining the**:* Target audience
	+ Who do we communicate with? / Who will be impacted by the change?
	+ How many unique groups are there?
	+ What do they know already?
	+ What will motivate them to adopt the change? / What are their needs? And Are we able to meet the needs?
* Key messages
	+ For each stakeholder group what do we need to communicate ie address the “What’s in it for me”.
	+ What is it that is changing?
	+ What are the benefits to the change?
	+ What is the key take away?
* Proposed channels
	+ What channels to you have access to?
	+ What channel will work best for each stakeholder group?
* Sender of the message
	+ Who will convey the message? ie Sponsor, middle management, team lead, other?
* Timelines
	+ When will you need to communicate the key messages?
	+ How often will the message need to be shared?
* What is the risk of not communicating?
* Budget
	+ Do we need $ resources to create messages? Ie video / print etc.
* Communication effectiveness
	+ How will you determine your communication efforts have been successful?
* Celebrating the implementation of the change
	+ How will success be celebrated?
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# Proposed communication plan / timeline of activities:

| **Date** | **Channel** | **Deliverer** | **Target Audience** | **Key Message** |
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| Communication tips:* Repeat each message a minimum of 5-7 times
* Clearly define the change, the reason for the change and the benefits for the change
* For large project create templates for key messages for mangers to access
* Clearly define the future state and the benefits the future state brings to each stakeholder group
* Communicate proactively, adjust your approach to the stakeholder group and their reactions to the change.
* Use a variety of channels to deliver each message. The preferred channel is in person. Be visible. Use both formal and informal approaches to deliver the message
* Keep all parties updated on the progress of the change
* If there is a downside to the change, communicate this. Where possible, provide the rationale for the decisions being made
* Be as transparent as possible to minimize misconceptions and rumors.
* It’s ok to not have all the answers. Share this along with a commitment to update impacted parties as the answers are determined. Do not guess the answers.
* Create a feedback mechanism, engage stakeholders in the change. Ask yourself: am I answering the question asked? Have I captured the concerns raised? Do the concerns need to be escalated?
* Align the Change Management communication plan with the Project Management communication plan.
* Emphasize the change will happen.
* Be clear on timelines. Where there are adjustments to the timeline, communicate these. .
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# Implementation and beyond (living the future state)

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| **In this section consider defining the proposed strategies to employ when the change is implemented and beyond.** * Review & act / respond to feedback collected
* What will your feedback mechanism be?
* How often will you ‘check-in’ with the stakeholders?

Suggested actions may include: 1. Day 1 to 30 post implementation:
	* Celebrate implementation
	* Continue offering training opportunities
	* Establish post implementation support mechanisms – drop in centre, email, phone etc
	* Measure success
	* Promote and encourage means for stakeholders to share feedback

*cont’d on next page….***In this section consider defining the proposed strategies to employ when the change is implemented and beyond.** 1. Month 2 to 12 post implementation
	* Measure success
		1. communicate & celebrate findings
	* Establish check in points with stakeholder groups
	* Perform SWAT or equivalent on project / change implementation
	* Gather user / customer experience data
2. Year 1 -3 post implementation.
	* Measure success
		1. communicate & celebrate findings

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