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. |

# 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 |

# 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? |

# 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? |

# 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? |

# 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) |

# 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? |

# 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. . |

# 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 |