



<Project Name> Change Management Plan

Version X.XX

Instructions to the Author:

This is a template for developing a project Change Management Plan.

The template includes instructions to the author, boilerplate text, and fields that should be replaced with the values and information specific to the project.

Blue text enclosed in boxes provide instructions to the document author, or describes the intent, assumptions, and context for the content included in this document. This instructional text should be removed from the final document to make the plan more readable.

Text enclosed in angle brackets (<text>) indicates a field that should be replaced with information specific to a project.

Text and tables in black are provided as boilerplate examples of wording and formats that may be used or modified as required to support a specific project. The information and outline is a suggestion to assist in developing project documents; they are not mandatory formats. The author should tailor the content of the document to fit the project that this work product will support.

Change Management Plan:

Change management is an important part of any project. Changes must be vetted and managed to ensure they are within the scope of the project and are communicated to all stakeholders if they are approved. The process for submitting, reviewing, and approving changes must also be communicated to all stakeholders to properly set expectations. If changes are submitted or implemented in an unorganized way, the risk of project failure becomes very high. All projects should include a Change Management Plan as part of the overall project plan.

With most projects, especially hybrid and agile projects, changes should be submitted as soon as it is detected.

A Change Management Plan outlines the strategy and procedures for dealing with changes. It may describe general procedures such as submitting a change request for review by the Change Control Board, how changes will be assessed, and other process details.

The purpose of the Change Management Plan is to define how the project team will effectively manage change requests from concept to closure with minimal impact while the project is underway. The project change management process follows five steps:

- Change request submission
- Change request review
- Change control plan development
- Implementation and monitoring
- Results assessment

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Revision History

Date	Version	Author(s)	Notes
1/1/2018	0.01		

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Introduction

Provide a brief introduction to the concept of change management for the intended audience of this document, i.e. the project team, project sponsor, stakeholders, and executive leadership.

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The Change Management Plan documents the information required to effectively manage project change from project inception to delivery.

The Change Management Plan is created during the Planning Phase of the project. The intended audience is the Project Manager, project team, project sponsor, project stakeholders, and any senior leaders whose support is necessary to carry out the plan.

Purpose

Define the purpose of this Change Management Plan. Provide an overview of the strategy the project team will follow to manage changes throughout the project life cycle.

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This Change Management Plan was created for the <PROJECT NAME> Project to set expectations on how change will be managed, what defines a change, the purpose and role of the project Change Control Board, and the overall project change management process. All project team members and stakeholders will be expected to submit or request changes to the project in accordance with this Change Management Plan, and all requests and submissions will follow the process detailed herein.

Scope

Define the scope of this Change Management Plan. Provide an overview of who and what will be governed by the plan. If a supplier is part of the engagement, explain what their responsibilities will be to this plan.

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This Change Management Plan is specific to the <PROJECT NAME> Project team. Project team members have a responsibility to recommend, document, and submit change requests when their work efforts are redirected in compliance with the change management processes defined in this plan. Stakeholders are required to do the same whenever they request a change in the project.

Changes should be submitted as soon as possible after discovery.

Objectives

Detail the objectives and approach the project team will take to manage change requests.

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The <PROJECT NAME> Project will take an integrated approach to manage change from identification through to closure. The documentation of change is a critical aspect of this plan. The objective of this plan is to aggressively address and quickly resolve requests for change as they are raised throughout the project delivery timeline.

Escalation Process for Change

Provide a list of personnel and their key roles and responsibilities with respect to change management as members of the project Change Control Board.

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The Change Control Board (CCB) is the approval authority for all proposed change requests pertaining to the <PROJECT NAME> Project. The purpose of the CCB is to review all change requests, determine their impacts on the project risk, scope, cost, and schedule, and to approve or deny each change request.

The <PROJECT MANAGER OR OTHER DESIGNEE> will serve as the Change Manager for this project. The Project Manager will develop the Change Management Plan and establish the CCB at the planning phase of the project. The change management roles and responsibilities of key members of the project Change Control Board are listed below.

Name/Title	Role	Change Management Responsibility
	Executive Sponsor	
	Project Sponsor	
	Change Manager	
	Stakeholder	
	Stakeholder	

Procedures

Provide a summary of how change management activities will be performed, recorded, and monitored throughout the lifecycle of the project.

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Change requests will be elevated as early as possible in the project to minimize their impact. The following sections outline the procedures the project team will follow in the management of project issues.

Inputs

Provide a summary of the inputs into this project's change management process.

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The inputs to the change management process for the <PROJECT NAME> project:

- Project Management Body of Knowledge (PMBOK) Version 6
- DSS PMO Project Governance Plan
- Project Charter
- Project Management Plan
- Risk Management Plan
- Quality Assurance Plan
- Communications Management Plan
- Action Items Log
- Decision Log
- Project Plan
- Risk Log

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Process

Outline the project change management process the project will follow.

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The <PROJECT NAME> Project Change Management Plan establishes an iterative process for escalating changes and managing them through approval, execution, and closure. It is imperative that changes are documented, escalated, and resolved in a timely manner. Change request tracking and reporting is an important part of the process, because it allows project leaders and the CCB to have an accurate understanding of project changes in progress and their impact to the project plan to make timely and informed decisions. An effective change management process escalates change requests as soon as they are known and clearly states the impact of the change to the project, the action or decision that is needed for resolution, and who needs to take the action or make the decision to implement the change. Change requests that are material to the project's success require escalation as early as possible to eliminate or minimize their impact to the project.

The change management process described in this plan consists of five high-level steps, which are supported by several underlying activities:

Step One: Change Request Submission (complete as soon as change is known)

1. Develop a description of the scope of the change
2. Determine the impact of the change to the project and stakeholders
3. Complete the Project Change Request (CR) Form
4. Update Change Log with initial entry
5. Review the CR with the Project Manager
6. Submit the CR Form to the Change Control Board (CCB)

Step Two: Change Request Review by the CCB (complete as soon as possible after receipt of change request)

1. Verify the specification (completeness and correctness)
2. Assess resources and requirements
3. Assess cost benefits analysis
4. Assess impact analysis
5. Approve/Disapprove/Request Additional Analysis
 - a. If Approved – The CR becomes a Change Control and proceeds to Step Three
 - b. If Disapproved – The CR process ends
 - c. If additional analysis is required, the CR is returned to the submitter for the action

Step Three: Change Control Plan Development (APPROVED) (complete in a timely manner, especially if the change has a severe impact to the project)

1. Determine how changes will be communicated
 - a. Determine who needs to know about the changes (e.g. project team members, stakeholders, executive leadership)
 - b. Determine how key personnel will be notified (e.g. depending on urgency: meeting, memo, etc.)
2. As required, secure additional funding

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3. As required, update contract terms and conditions
4. Plan allocation of resources and assets
5. Finalize change control milestones and schedule
6. Revise project plan

Step Four: Implementation and Monitoring

1. Communicate plan to project members, stakeholders, and service providers
2. Allocate resources and assets
3. Initiate change
4. Monitor milestones, scope, impact, issues
5. Evaluate success
6. Finalize and report

Step Five: Assess Results

1. Assess results
2. Evaluate for future improvements
3. Compile lessons learned
4. Communicate findings to project stakeholders

Outputs

Provide a summary of the outputs of this project's change management process.
Remove this instruction text from the final document.

The outputs of the project incident management process for the <PROJECT NAME> Project are as follows:

- Change Log
- Project Plan updates
- Project Status Reports

Tools

Provide an overview of the tools the project will use and the practices the team is committed to follow to manage project change requests. At minimum, the project team should establish a repository for collocating the Change Management Plan and the change request artifacts that will be generated over the life cycle of the project.
Remove this instruction text from the final document.

Change Management Repository

Detail the location (directory, system, etc.) and a high-level overview of organization structure of the Change Management Repository. If available, provide an accessible link to the repository's location.
Remove this instruction text from the final document.

Change Log

Provide an outline of what (i.e. DSS Change Log Template, change management system, etc.) will be used to capture and track change requests. Provide a list of the key information items that will be captured for each change request. Detail where the change log will be maintained. If available, provide an accessible link to the change log's location.
Remove this instruction text from the final document.

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References and Related Documents

Provide references to any project work products this plan is dependent on or are dependent on this Change Management Plan. For example, the Risk Management Plan may contain a list of contingencies which could require change requests; the project schedule will likely include change control board request reviews at weekly and monthly intervals.

Remove this instruction text from the final document.

Approvals

Identify by name, title, and signature the individuals agreeing to authorize expenditure of organizational resources to accomplish the project activities outlined in this Change Management Plan. At a minimum, the plan should be signed by the Project Manager, the Project Sponsor, and, if applicable, the Executive Sponsor.

Remove this instruction text from the final document.

Role	Name & Title	Signature	Date