

Change Management Plan

#1. Purpose

This change management plan provides a structured approach for preparing, implementing, and sustaining organizational change. The goal is to support smooth adoption, minimize disruption, communicate clearly with stakeholders, and ensure the change produces measurable benefits.

#2. Change Summary

Item	Description
Change Initiative	[Insert name of change initiative]
Business Need	[Insert reason for the change]
Primary Objective	[Insert main goal of the change]
Expected Outcome	[Insert desired result]
Target Launch Date	[Insert launch date]
Change Owner	[Insert responsible person or department]

#3. Scope

The scope defines what is included in the change effort and what is outside the current implementation.

In Scope

- Teams, departments, or locations directly affected by the change
- Processes, workflows, systems, policies, or responsibilities being updated
- Training, communication, support, and adoption activities
- Implementation planning, launch coordination, and post-launch stabilization

Out of Scope

- Processes or departments not included in the current rollout
- Future phases not approved for implementation

- Unrelated system upgrades, policy revisions, or workflow redesigns
- Long-term enhancements outside the initial change timeline

#4. Change Objectives

The change initiative is designed to achieve the following objectives:

- Improve operational efficiency and consistency
- Reduce errors, delays, or duplicated work
- Strengthen communication and accountability
- Support compliance with organizational standards
- Increase employee readiness, confidence, and adoption
- Create a sustainable process for long-term success

#5. Change Impact Assessment

A clear understanding of impact helps ensure that stakeholders receive the right level of communication, training, and support.

People Impact

The change may affect employee roles, responsibilities, expectations, decision-making authority, workload, or daily routines. Individuals may need to learn new processes, use new tools, follow updated guidelines, or adjust established work habits.

Process Impact

The change may alter workflow steps, approval paths, documentation requirements, handoffs, timelines, reporting expectations, or quality-control procedures. Updated process maps, checklists, and job aids may be required to support consistent adoption.

Technology Impact

The change may involve new software, system updates, access permissions, integrations, data-entry requirements, reporting tools, or technical support procedures. Testing and user readiness should be completed before launch.

Business Impact

The change is expected to improve organizational performance by increasing accuracy,

efficiency, transparency, and service quality. Temporary disruption may occur during the transition period, particularly if users require additional time to adjust.

#6. Stakeholder Analysis

Stakeholder engagement is essential to building support and reducing resistance. Each stakeholder group should receive communication and support that reflects its level of influence and impact.

Stakeholder Group	Interest/Impact	Influence Level	Engagement Approach
Executive Leadership	Strategic alignment, business outcomes, resource approval	High	Sponsor briefings, milestone updates, decision meetings
Managers and Supervisors	Team readiness, workflow changes, staff accountability	High	Manager briefings, talking points, coaching guides
Employees/End Users	Daily process changes, new responsibilities, training needs	High	Training sessions, FAQs, job aids, support channels
IT/Operations	System readiness, implementation support, issue resolution	High	Technical planning, testing, go-live support
Human Resources	Role impacts, policy alignment, employee support	Medium	Policy review, communication coordination
Support Teams	Questions, troubleshooting, escalation management	Medium	Readiness sessions, support scripts, escalation paths
Customers/Clients, if applicable	Service experience, response times, communication changes	Medium	Service notices, updated guidance, feedback options

#7. Governance and Roles

Clear ownership ensures accountability throughout the change process.

Role	Responsibilities
Executive Sponsor	Champions the change, communicates strategic importance, removes barriers, approves major decisions
Change Lead	Coordinates the change management plan, stakeholder engagement, communication, training, and adoption tracking
Project Manager	Manages project timeline, milestones, deliverables, risks, and implementation activities
Department Managers	Prepare teams, reinforce expectations, address concerns, and monitor adoption
Communications Lead	Develops and distributes messages, announcements, FAQs, and leadership updates
Training Lead	Creates training materials, schedules sessions, tracks completion, and supports learning needs
IT/Operations Lead	Ensures technical readiness, testing, access, support, and issue resolution
End Users	Participate in training, adopt new processes, follow updated procedures, and provide feedback

#8. Change Strategy

The change strategy focuses on awareness, readiness, adoption, and sustainability.

Awareness

Stakeholders must understand what is changing, why the change is necessary, when it will happen, and how it supports organizational goals. Early awareness reduces uncertainty and encourages engagement.

Readiness

Employees and leaders must receive the information, tools, training, and resources needed to

perform successfully under the new process or system. Readiness activities should occur before launch and continue during stabilization.

Adoption

Adoption depends on consistent leadership reinforcement, accessible support, practical training, and timely feedback. Managers play a key role in encouraging use of the new process and addressing issues quickly.

Sustainability

The change should become part of normal business operations through updated policies, standard operating procedures, performance expectations, reporting, and ongoing monitoring.

#9. Communication Plan

Communication should be clear, timely, repeated, and tailored to the needs of each audience.

Audience	Key Message	Channel	Timing	Owner
Executive Leadership	Business case, risks, progress, key decisions	Leadership meeting, email summary	Before launch and at major milestones	Executive Sponsor
Managers and Supervisors	Team impact, expectations, talking points, support role	Manager briefing, toolkit, email	2–4 weeks before launch	Change Lead
Employees/End Users	What is changing, why it matters, required actions, training details	Email, staff meeting, intranet, FAQ	1–2 weeks before launch and launch week	Communications Lead
IT/Operations	System readiness, support model, escalation process	Working session, checklist, status meeting	Before go-live	Project Manager
Support Teams	Common questions, known issues, response procedures	Support guide, training session	Before go-live	Operations Lead
All Stakeholders	Launch confirmation, available resources, support instructions	Announcement, email, internal update	Launch day	Executive Sponsor or Communications Lead

Communication Principles

- Use simple, direct language
- Explain the reason for the change
- Identify what actions are required
- Repeat critical information through multiple channels
- Provide timelines, support resources, and points of contact
- Share progress updates and early wins after launch

#10. Training and Enablement Plan

Training ensures that affected users have the knowledge and confidence to adopt the change

successfully.

Training Methods

- Live training sessions
- Recorded demonstrations
- Step-by-step user guides
- Quick-reference job aids
- Frequently asked questions
- Manager coaching guides
- Office hours or open support sessions
- Practice exercises or system walkthroughs

Training Topics

- Overview of the change and business reason
- New roles, responsibilities, or expectations
- Updated workflow or process steps
- System navigation or tool usage, if applicable
- Common mistakes and how to avoid them
- Support resources and escalation procedures
- Compliance, documentation, or reporting requirements

Training Readiness Checklist

Readiness Item	Status	Owner
Training materials developed	[Not Started/In Progress/Complete]	Training Lead
Training schedule confirmed	[Not Started/In Progress/Complete]	Training Lead
Managers briefed	[Not Started/In Progress/Complete]	Change Lead
User access confirmed, if applicable	[Not Started/In Progress/Complete]	IT/Operations Lead
Job aids and FAQs finalized	[Not Started/In Progress/Complete]	Communications Lead
Support process documented	[Not Started/In Progress/Complete]	Operations Lead
Training attendance tracked	[Not Started/In Progress/Complete]	Training Lead

#11. Resistance Management

Resistance is a normal part of change. Proactive planning helps reduce uncertainty, address concerns, and build trust.

Common Sources of Resistance

- Lack of understanding about the reason for the change
- Concern about increased workload or complexity
- Fear of losing control, influence, or familiar routines
- Previous negative experiences with change
- Insufficient training or unclear expectations
- Limited manager support or inconsistent messaging

Resistance Management Actions

- Identify concerns early through feedback and manager input
- Communicate the purpose and benefits of the change clearly
- Provide opportunities for questions and discussion
- Involve informal influencers and early adopters
- Offer additional coaching or training where needed
- Address misinformation quickly
- Recognize teams and individuals demonstrating adoption
- Track resistance patterns and escalate unresolved barriers

#12. Implementation Plan

The implementation plan organizes the change into clear phases.

Phase 1: Preparation

Activity	Description	Owner
Confirm scope	Define affected teams, processes, tools, and timeline	Project Manager
Identify stakeholders	Map stakeholder groups and engagement needs	Change Lead
Assess impact	Review people, process, technology, and business impacts	Change Lead
Develop communications	Create announcements, FAQs, manager talking points, and updates	Communications Lead
Prepare training	Develop materials, schedule sessions, and confirm trainers	Training Lead
Review risks	Identify potential barriers and mitigation actions	Project Manager

Phase 2: Readiness

Activity	Description	Owner
Conduct manager briefings	Prepare managers to support teams	Change Lead
Deliver training	Provide required training to affected users	Training Lead
Confirm technical readiness	Complete testing, access setup, and support planning	IT/Operations Lead
Finalize support resources	Prepare help desk scripts, job aids, and escalation paths	Operations Lead
Complete readiness check	Confirm launch readiness across teams	Project Manager

Phase 3: Launch

Activity	Description	Owner
Send launch announcement	Communicate go-live details and support resources	Communications Lead
Activate new process/system	Begin use of updated workflow, system, or policy	Project Manager
Provide launch support	Offer real-time troubleshooting and user assistance	Operations Lead
Monitor early issues	Track questions, errors, delays, and adoption barriers	Change Lead
Escalate critical problems	Resolve high-impact issues quickly	Project Manager

Phase 4: Stabilization

Activity	Description	Owner
Monitor adoption	Track use of the new process or system	Change Lead
Collect feedback	Gather input from managers, users, and support teams	Change Lead
Resolve recurring issues	Address patterns in support tickets or user concerns	Operations Lead
Reinforce expectations	Use manager reminders, follow-up communications, and recognition	Managers
Update materials	Revise FAQs, job aids, and procedures based on feedback	Communications Lead

###Phase 5: Sustainment

Activity	Description	Owner
Measure outcomes	Compare results against success metrics	Change Lead
Transition ownership	Move responsibilities to business-as-usual owners	Project Manager
Document lessons learned	Capture what worked, what did not, and future recommendations	Project Manager
Standardize process	Update policies, SOPs, onboarding, and performance expectations	Department Owner

#13. Risk Management

Risk management supports proactive planning and helps reduce implementation disruption.

Risk	Likelihood	Impact	Mitigation Strategy
Low user adoption	Medium	High	Provide targeted training, manager reinforcement, and adoption tracking
Confusion about new process	High	Medium	Use clear FAQs, workflow guides, and repeated communication
Technical issues during launch	Medium	High	Complete testing, prepare contingency plans, and staff launch support
Manager resistance or inconsistent messaging	Low	High	Brief managers early and provide talking points and escalation options
Training gaps	Medium	Medium	Track attendance, offer make-up sessions, and provide recorded materials
Support team overload	Medium	Medium	Prepare scripts, triage procedures, and additional launch support
Timeline delays	Medium	Medium	Monitor milestones, escalate blockers, and adjust rollout plans as needed

#14. Success Metrics

Success should be measured through adoption, performance, and user experience indicators.

Adoption Metrics

- Training completion rate
- Percentage of users actively using the new process or system

- Compliance with new workflow steps
- Reduction in use of outdated tools or processes
- Manager confirmation of team adoption

Operational Metrics

- Processing time before and after implementation
- Error or rework rates
- Volume of support tickets over time
- Completion rates for required tasks
- Service quality or customer satisfaction measures, if applicable

People Metrics

- Employee readiness survey results
- User confidence ratings
- Feedback from managers and support teams
- Participation in training and office hours
- Qualitative comments identifying concerns or improvements

#15. Timeline

Timeframe	Milestone	Key Activities
Weeks 1–2	Planning and assessment	Confirm scope, identify stakeholders, complete impact assessment, develop change strategy
Weeks 3–4	Communication and training preparation	Create communication materials, develop training resources, prepare manager toolkit
Week 5	Readiness activities	Conduct manager briefings, begin training, confirm support process and technical readiness
Week 6	Launch	Send launch announcement, activate change, provide real-time support, monitor early adoption
Weeks 7–8	Stabilization	Resolve issues, reinforce expectations, gather feedback, update resources
Week 9 and beyond	Sustainment	Measure results, document lessons learned, transition ownership, standardize updated procedures

#16. Support Model

A defined support model ensures users know where to go for assistance and how issues will be resolved.

Support Level	Purpose	Examples	Owner
Self-Service Support	Provides immediate answers and guidance	FAQs, job aids, recorded training, process guides	Communications Lead
Manager Support	Addresses team-level questions and reinforces expectations	Team huddles, coaching, reminders	Managers
Operational Support	Handles process questions and routine troubleshooting	Support mailbox, help desk, office hours	Operations Lead
Technical Support	Resolves system access, functionality, and technical issues	Ticketing system, IT escalation	IT Lead
Escalation Support	Addresses high-risk or unresolved barriers	Leadership review, project escalation	Project Manager

#17. Post-Change Review

A post-change review should be completed after stabilization to evaluate effectiveness and identify improvements.

Review Questions

- Did the change achieve the intended objectives?
- Were stakeholders adequately prepared?
- Were communication and training effective?
- What issues occurred during launch and stabilization?
- What resistance patterns appeared?
- What support resources were most useful?
- What should be improved for future change initiatives?

Review Outputs

- Summary of results against success metrics
- Lessons learned
- Open issues and action plan

- Recommended process updates
- Ownership transition plan
- Final project closure summary

#18. Approval

Name/Role	Responsibility	Approval/Date
Executive Sponsor	Approves strategic direction and launch readiness	[Insert approval/date]
Change Lead	Approves change management approach	[Insert approval/date]
Project Manager	Approves implementation plan and timeline	[Insert approval/date]
Department Owner	Approves operational handoff and sustainment plan	[Insert approval/date]

Appendix A: One-Page Change Summary

Category	Summary
Change	[Briefly describe what is changing]
Reason	[Explain why the change is needed]
Goal	[Identify the intended outcome]
Impacted Groups	[List affected teams, departments, or users]
Key Dates	[Insert important milestones and launch date]
Training	[Describe training format and schedule]
Communication	[Describe communication channels and timing]
Main Risks	[List top risks and mitigation actions]
Success Measures	[List adoption and performance metrics]
Owner	[Insert accountable owner]