Organizational Change Management Plan Checklist

Document Guide

The following table presents the answer to some of the key initial questions regarding the Organizational Change Management Plan Checklist.

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| **Topic** | **Guidance** |
| **Why is this document important?** | The Organizational Change Management Plan is the plan to support the adoption and sustainability of organizational change |
| **Why should I use this document?** | The Change Management Plan identifies the necessary activities to drive change in the organization, including stakeholder engagement, leadership alignment, communication, and training and knowledge transfer activities designed to address the needs of different stakeholder groups. |
| **Is this a mandatory document?** | This document is mandatory for moderate and high complexity projects. For low complexity projects, the Organizational Change Management Plan and Communication Plan can be combined into one document.  |
| **Who should complete this document?** | Change Management Lead |
| **Is this document required for OCIO reporting?** | No |
| **Where can I get additional help from?** | Ministry PMO or PMP designated project manager. |

Once you have reviewed this checklist, please answer the question below:

|  |  |
| --- | --- |
| **In reviewing this checklist, have you identified any new risks or issues that are not fully addressed by the Training Log document?**  | 🞏 Yes 🞏 No**If yes, have you recorded and escalated the risk/issue in the appropriate log?** |

**Purpose**

Organizational Change Management supports the adoption and sustainability of organizational change. The Change Management Plan addresses change impacts through targeted change solutions / activities (e.g., leadership alignment, communication, training and knowledge transfer activities) designed to address each stakeholder group’s needs.

This checklist is intended to provide a starting point for individual projects to support the development of a detailed Organizational Change Management Plan required for projects. The Change Management Plan is a living document that will evolve to meet the adapting needs of the project and impacted stakeholder groups.

**Key Sections**

The following table provides the suggested sections and sub-sections for the Organizational Change Management Plan. Each project is responsible for tailoring and adapting the following outline to their specific project requirements and obtaining the level of expertise required for successful delivery.

| **🞏** | **#** | **Section** | **Sub-Section** | **Description** |
| --- | --- | --- | --- | --- |
| **🞏** | **1** | **Purpose and Expectation** | Provide an overview of the Organizational Change Management Plan. |
| **🞏** | **2** | **Change Preparation** | **Stakeholder Identification and Analysis** | Identify all impacted stakeholder groups and assess each group’s level of influence on the project, degree of impact and current level of engagement or support. The findings from the Stakeholder Assessment will help define how each stakeholder group should be engaged in the project.  |
| **Change Readiness Assessment** | Conduct a change readiness assessment that identifies the degree to which the organization is prepared to undergo the change in its current state. The assessment helps identify the level of effort required to implement change and the key areas of risk to inform the prioritization of change activities. |
| **Change Impact Assessment** | Outline change impacts (identified through Stakeholder Analysis and Change Readiness Assessment), including the assessment of changes to processes, people and technology. Each change impact will need to be addressed by the appropriate change management activities in order to mitigate associated risks and ensure successful implementation.  |
| **Leadership Alignment** | Design and conduct activities that align leaders around the proposed changes. Create a shared and comprehensive project understanding among leaders. Organizational change requires visible leadership sponshorship and commitment. Assessment and ongoing alignment of key leaders is a critical success factor to initiate and sustain change.  |
| **Change Agent Preparation / Program** | Initiate the engagement of change agents in the project by selecting, recruiting, and educating them on their role. Change agents are stakeholders in the organization, selected to acquire deep knowledge and expertise on the new system and processes so that they can support testing, training, go-live, and post go-live activities. |
| **🞏** | **3** | **Communication Strategy and Plan** | **See Communication Plan Checklist and Tracker <link TBD>** |  |
| **🞏** | **4** | **End User Training and Support** | End user training and support is critical in enabling employees with the skills and knowledge they need to be able to adapt to the change. This includes the planning, designing, development and delivering of end user training program and support. |

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