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Change Management Plan

Project Name:

Prepared By:

Title:

Version No:

Document Change Control

The following is the document control for revisions to this document.

Version Number	Date of Issue	Author(s)	Brief Description of Change

Definition

The following are definitions of terms, abbreviations and acronyms used in this document.

Term	Definition

Table Of Contents

1. PROJECT CONSTRAINTS	1
2. CHANGE MANAGEMENT GUIDELINES AND PURVIEW.	1
3. ESTIMATE OF CHANGE VOLUME	1
4. ROLES AND RESPONSIBILITIES.....	1
5. THE CHANGE MANAGEMENT PROCESS.....	2
6. TOOLS	3
7. APPENDICES.....	3

1. Project constraints

We acknowledge the following project constraints:

[Identify the driving constraints for the project. These are the assumptions against which change is managed. Examples:

- *fixed budget set at \$_____*
- *hard deadline*
- *minimum quality threshold.]*

2. Change management guidelines and purview.

The following items will be subject to change management.

[Specific list of primary deliverables and the documents that describe them, and secondary deliverables that will fall under change management. Examples:]

Primary deliverables

- *Software application as described in these specifications documents*
- *Hardware deployment as described in these bill of materials and configuration plan documents and machine room blueprint*

Secondary deliverables

- *Project WBS*
- *Project budgetary and scheduling documents*
- *Project quality control planning document*
- *Project reporting requirements*

The project team has latitude *[is strictly bound]* to interpret requirements in the following areas:

[Specific list of areas in the product specification or requirements where the project team is either strictly bound by the documents or has the prerogative to interpret the requirements more loosely.]

3. Estimate of change volume

The budgetary impact of change in this project is expected to fall within the range of *[lower]* to *[higher]* dollars. We assume the number of change requests will be roughly _____. We estimate change evaluation and management to require _____ hours.

4. Roles and responsibilities

[For evaluators, note any special expertise that may be required given the sorts of changes you can anticipate. This sets the stage for ensuring access to that expertise.]

The **change manager** is responsible to

- receive and log change requests

- monitor project and recognize changes that result from realized risks and issues
- track and facilitate the timely evaluation of change requests
- track and facilitate timely decisions on changes
- incorporate changes into the appropriate project documents
- communicate changes to the project team and others as the communication plan below dictates
- report change management activity as outlined in the reporting section below
- analyze patterns in change requests to identify underlying systemic causes
- ensure that the evaluation team is appropriately staffed to meet the volume and expertise requirements of the change queue

The **change requestor**, who is any key stakeholder, may submit project change requests following the submittal process indicated below.

The **lead change evaluator** is charged to

- organize and perform the timely and adequate evaluation of changes in terms of their impacts on project deliverables and constraints
- outline options and recommend courses of action and priorities for changes
- ensure that appropriate expertise is brought to bear in the evaluation of all changes

Change evaluators work under the direction of the lead evaluator to

- apply their particular expertise and judgment to the evaluation of changes assigned to them
- develop options and recommend courses of action for these changes

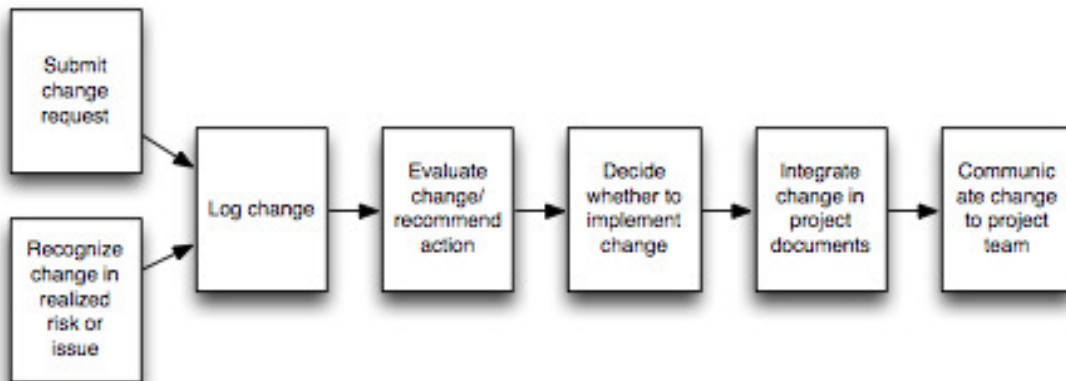
The **change decision maker** is responsible to

- approve, reject, or park changes
- request further evaluation if insufficient information is available to support the decision

5. The change management process

For each change the following process will be followed. Note that logging occurs at various points in the process, e.g. after evaluation and after the decision, not shown in this diagram.

Change Management Process



5.1 Submittal and Logging: Change requests will be submitted using the change request form referenced below. A change resulting from a realized risk or issue will be documented through a change request form. The change manager will scan risks and issues for likely changes every ____ *[days, weeks]*. The change manager will identify checkpoints in the WBS critical path at which to survey the project team, customer, sponsor, and stakeholders for changes. These checkpoints will be chosen with the aim of minimizing the impact of changes on the project constraints.

5.2 Evaluation: The lead change evaluator will note any special expertise required to effectively evaluate a change request.

[Note any likely areas of expertise required and identify the resources you will use to secure the expertise. It would be prudent before the onset of the execute and control stage to have verified the availability of these resources. Example: your project involves the development of licenses for which legal advice is required. You will obtain that advice from whom?]

Unless otherwise noted, change requests will be evaluated within ____ days of submission to the evaluators.

5.3 Decision: Unless otherwise noted, changes will be approved, rejected, or parked within ____ days of submission to the change decision maker. The decision maker may also request further evaluation.

5.4 Integration: The change manager will update project documentation as changes are approved. All changes will be recorded in the document change control block. Project drawings, diagrams, and specifications will be reissued when accumulated change notations render the documents confusing, ambiguous, or otherwise unclear. Project documentation will be posted to this site *[<http://myproject.doit.wisc.edu>]*. A running summary of changes will be posted to this page *[http://myproject.doit.wisc.edu/approved_changes/]*.

5.5 Communication: The project team and sponsor will be notified of changes as they are approved through email. A summary of recent changes will be reviewed in weekly team meetings. A change summary will be published to stakeholders and customers with the *[note reporting period, e.g. monthly]* project status report.

6. Tools

Change request form

See attached change request template.

Change log

See attached change log template.

7. Appendices

[Add additional information as needed.]