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Project Management, project planning, templates and advice

<PROJECT NAME>

<PROJECT REFERENCE>

CHANGE MANAGEMENT PLAN

CHANGE MANAGEMENT PLAN

DOCUMENT CONTROL

DOCUMENT INFORMATION

	Information
Document Id	<i>[Document Management System #]</i>
Document Owner	<i>[Owner Name]</i>
Issue Date	<i>[Date]</i>
Last Saved Date	<i>[Date]</i>
File Name	<i>[Name]</i>

DOCUMENT HISTORY

Version	Issue Date	Changes
<i>[1.0]</i>	<i>[Date]</i>	<i>[Section, Page(s) and Text Revised]</i>

DOCUMENT APPROVALS

Role	Name	Signature	Date
Project Sponsor			
Project Review Group			
Project Manager			

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Quality Manager <i>(if applicable)</i>			
Procurement Manager <i>(if applicable)</i>			
Communications Manager <i>(if applicable)</i>			
Project Office Manager <i>(if applicable)</i>			

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TEMPLATE GUIDE

How to use this template

This is a guide to the common sections included in a [Change Management Plan](#). Sections may be added, removed or amended to suit your project. Example tables have been added (where relevant) these are just a suggestion, you may decide to format these sections differently.

Text in Blue italics is designed to assist you in completing the template. Delete this text before sharing the final document.

CHANGE MANAGEMENT PLAN

CHANGE MANAGEMENT APPROACH:

Describe [change control](#) policies and procedures and how [change control](#) will interface with other aspects of [project management](#).

DEFINITIONS OF CHANGE:

In this section explain what a change is as opposed to an expected variance. It is likely that you will refer to the project's [cost](#), schedule and [scope](#) tolerances aka variance thresholds in this section. For example, cost variances of <1% might not require [change control](#). Refer to the [project management plan](#) for the variance thresholds.

Find out more about [Project Tolerances](#).

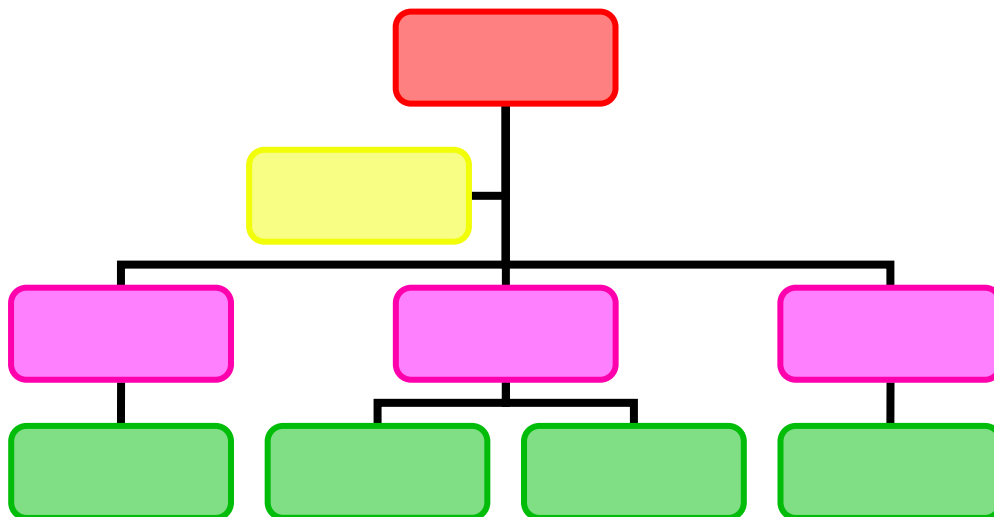
Change type	Change definition
Schedule change: 	Confirm what would constitute a schedule change and trigger a change request versus a schedule revision. For an example see Schedule Variance Threshold .
Budget change: 	Define a budget change versus an update. Show when a budget variance would exceed the project tolerance and trigger the change control process.
Scope change: 	Define a scope change as opposed progressive elaboration. Describe when a scope variance would exceed project tolerance and trigger the change control process.
Project document changes: 	Explain when changes to the project management documentation will need to go through change control for re-baselining. For example, changes to the project management plan or KPIs in the Business Case .

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CHANGE CONTROL BOARD:

List the members of the change control board along with their role, responsibilities and sign-off authority. You might also identify any person they delegate their authority to if they are not available.

Name	Role	Responsibility	Authority
<i>Board member's name</i>	<i>Their role in the board</i>	<i>The responsibilities and tasks required of the role.</i>	<i>The persons sign-off authority i.e. what changes they can approve.</i>



CHANGE CONTROL PROCESS:

Detail each step in the change control process. Include the people involved and any systems e.g. IT systems used.

Process step	Description
<u>Change request</u> submittal	Describe how <u>change requests</u> are submitted, including which form or system is used and any unique ID or referencing that is used. Include who will receive the <u>change requests</u> and if any change type will be routed to differently e.g. cost changes might go to project accounting.
<u>Change request</u> tracking	Describe how <u>change requests</u> will be tracked from

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	<i>submission to closure. Include details of any IT systems used and any network or file locations.</i>
Change request review	<i>Describe how changes will be reviewed. Including how each change will be analyzed in relation to the project business case, project management plan, schedules, risk register etc.</i>
Change request disposition	<i>Document the possible statuses that a change can have once it has been reviewed for example, accepted, deferred or rejected.</i>

CHANGE CONTROL MEETINGS

Change Control Meetings are for evaluating changes, creating options, and preparing [change requests](#) for submittal to whoever has authority to approve those changes (PM, [Change Control Board](#), or sponsor).

Document the meetings that will be held to manage changes. For example, this may include meetings to prepare changes for submittal to the board along with the board meetings.

Include the meeting:

- *Frequency*
- *Attendees*
- *Timings and location*
- *Details of the Scribe, what information will be captured, and how actions will be monitored.*
- *Details of the Chair and their responsibility.*

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