**Purpose of the Document**

Document your plan for communication, sponsorship, stakeholder management, readiness, training and turnover. Your plan should incorporate the stages of changes to help your stakeholders, customers, end-users to obtain awareness, understanding, acceptance and commitment to Change.

***Template Instructions***

*Note that the information in italics is guidelines for creation of the document sections. To adopt this template, delete all italicized instructions and modify as appropriate*

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# Project Overview

## Objectives

*Document project goals and deliverables.*

## Scope

*Provide statements that provide overall context for what the project is trying to achieve. Describe briefly the tangle products, services or deliverables that the project will deliver.*

# Change Specifications

## Policy/Rules & Regulation Changes

*Document any impact to policy, rules and regulation changes.*

## Process & Procedures Changes

*Document any process/procedure/workflow that may be impacted by the changes.*

## Role Changes

*Document impact to existing roles. Document new roles and their impact.*

*Any security impact.*

## Customer Facing Changes & Potential Impact

*Document or display customer facing changes. Display current version of pages or new wireframes.*

*Campus/Division/College wide impact*

# Stakeholders & Resources

## Key Stakeholders

*Key stakeholders to consider when implementing the Change Management & Process & Workflow Plan. Each project would rely on these stakeholders to support the implementation plan.*

|  |  |  |
| --- | --- | --- |
| Name | Department/ Area | Work Group |
|  |  | Test Manager |
|  |  | Test Lead |
|  |  | Test Analyst |

## Project Team

*Project team members to consider when implementing the Change Management & Process & Workflow Plan. Each project would rely on these members to support the implementation plan.*

|  |  |
| --- | --- |
| Name | Role |
|  | Test Manager |
|  | Test Lead |
|  | Test Analyst |

# Change Management Plan

## Change Management Activities

*Specify change management activities. Below are some examples of activities to be incorporated.*

|  |  |  |
| --- | --- | --- |
| Activity | Responsible | Timeframe |
| *Develop and execute Change Management Plan* | *PM* |  |
| *Conduct Change Readiness Audit* | *PM* |  |
| *Develop & Execute Employee Communication Plan* | *PM/Communication Manager* |  |
| *Ensure Operational Readiness* | *PM* |  |

## Communication Plan

*Work with external and internal communication specialist(s) to complete communication plan.*

|  |  |
| --- | --- |
| Strategy | Details |
| *Print Collateral:*   * *Flyer* * *Brochure* * *Postcard* * *Print signage* |  |
| *Digital Media:*   * *Monday Bulletin* * *IRT Website* * *System Notification* * *SacSend/Email* * *Social Media* * *Campus Calendar* * *Digital Signage* |  |

# Process Reengineering Plan

## Process Activities

*Specify process activities. Below are some examples of activities to be incorporated.*

|  |  |  |
| --- | --- | --- |
| Activity | Responsible | Timeframe |
| *Conduct As-Is Processes Mapping* | *PM* |  |
| *Conduct To-Be Processing Mapping* | *PM* |  |
| *Develop & Execute Training Plan* | *PM* |  |
| *Develop & Execute Transition to Operations Plan* | *PM* |  |

## Workflow Activities

*Specify workflow activities. Below are some examples of activities to be incorporated.*

|  |  |  |  |
| --- | --- | --- | --- |
| Process | Objective of Reengineering | Timeframe | Resources Needed |
| *Support Process* |  |  |  |
| *Registration Process* |  |  |  |
| *Transfer Process* |  |  |  |

## Training Plan

|  |  |  |  |
| --- | --- | --- | --- |
| Audience | Training Materials | Delivery Method | Timeframe |
| *Workgroup/Division/College* |  |  |  |
| *Individual* |  |  |  |
| *Vendor* |  |  |  |