**Change Workplan Description**

The Change Management Workplan file includes the following tabs:

* OCM framework graphic
* OCM GANTT - use
* OCM workplan
* OCM Roles
* OCM Metrics

**Instructions**

We’ll provide suggestions for each of the tabs.

1. OCM framework graphic
	* Review this tab to understand the primary activities within a change effort
	* Use the table below estimate your project’s change management complexity

	 
	* For a project that fits the criteria for the green box, we recommend you undertake the blue activities within the change framework. These are labeled “Recommended Activities.”
	* For projects that fit the criteria for the yellow box, we recommend you undertake both the blue and yellow activities.
	* NOTE: If your project fits the criteria for the red box, we recommend you consult with the Change Enablement Team and consider a dedicated Change Management resource to support your project.
2. OCM GANTT
	* This tab is a great place to start planning your high-level change management effort.
	* Note: The template assumes a broader program with three workstreams; please tailor it to your needs.
		+ Rows 2 & 3 show program and change management milestones for the broader program.
		+ Rows 5 & 6; 8 & 9; 11 & 12 show project and change management activities to undertake for each of the workstreams (or projects) rolling up into the broader program.
		+ Rows 14 & 15 show important dates to keep in mind for vendors and customers. We suggest you add trade unions and work for councils as a separate row in this section if needed. You can also add statutory bodies and other authorities as a separate row.
	* Begin by updating the dates in the first row. We suggest starting with “week beginning” on a Monday.
	* Identify the week for your go-live date and highlight that column. This will give you a great perspective of the weeks remaining before go-live.
	* Fill in the important project milestones in the second row.
	* You can then add the key change management milestones in the third row.
		+ We recommend you think through activities from the project’s launch through go-live.
		+ It also helps to work back from the project go-live to the kickoff, particularly when planning communication and training activities leading up to go-live.
		+ You can also color-code specific activities to illustrate the critical path.
	* Once you work through the key milestones, please continue with the workstream rows if applicable to your project
	* As noted above, we suggest you have separate rows as needed for vendors, customers, trade unions, work councils, statutory bodies, and other authorities.
	* Once you have completed the high-level plan, you have the key headings to outline the primary activities in your work plan.
3. OCM workplan
	* This is the detailed workplan for your change effort.
	* The template has several formulas that help visualize status and timing
		+ Status (Column T) is calculated using the start/end dates, and the percent complete columns
		+ The timeline is created using a complex formula. If you need to add rows, we recommend you copy the entire row and insert it. If you insert a row without the formulas, you can also “copy-down” the formulas.
	* Begin by highlighting the “go-live” date
	* Update the “weeks remaining to go-live” in the first row
	* Hide the calendar dates that do not apply to your project. NOTE: It is easier to hide the columns; if you delete columns, you may need to update the formulas.
	* Update the tasks in columns C, D, E, F
		+ Note: each of the project stages has a section for “Project Team.”
			- These are activities usually performed by the project team that the Change Management team depends on.
			- Review this section with the project manager to understand who is responsible for those activities.
	* Assign the responsible team member in Column J
	* Update the start and end dates for the activities/tasks
4. OCM Roles
	* Review the roles we recommend for your change initiative
	* On smaller projects, the authorizing and reinforcing sponsors may be the same person/people
	* Review this tab with the project manager to agree to the roles you will need for the project
	* Update the estimated time required to help people understand how much time is required for each role
5. OCM Metrics
	* We’ve identified common change management metrics to evaluate your change effort’s progress.
	* While these metrics are considered “lagging indicators” (they assess a current state, not a future state) if they are tracked as the project evolves, they can serve as indicators of your change effort’s “health.”
	* We’ve highlighted seven of the most common metrics. We recommend you identify four or five indicators that are easy to track.