Change Management *made easy*

HELPING PROJECT MANAGERS AND LEADERS PLAN CHANGE MANAGEMENT TO ENSURE A SUCCESSFUL INITIATIVE

Change management is the application of a structured process and set of tools for leading the people side of change to achieve a desired outcome for a project.

# Change Management helps leaders exceed objectives

Change Management helps you meet or exceed project objectives by managing the people side of change.

- Project management prepares the solution for the organization
- Change management prepares the organization for the solution

This guide will help you estimate the change effort needed for your project. We share recommended activities and timing for low-complexity projects. We also suggest options to consider for medium or high-complexity projects.

How to use this guide:

1. Read the basics on change management complexity below.
2. Work through the checklist on page 2.
3. Understand your options for support
   - Low – understand key activities & timing.
   - Medium – leverage tools & templates.
   - High – make the case for additional resources/support.
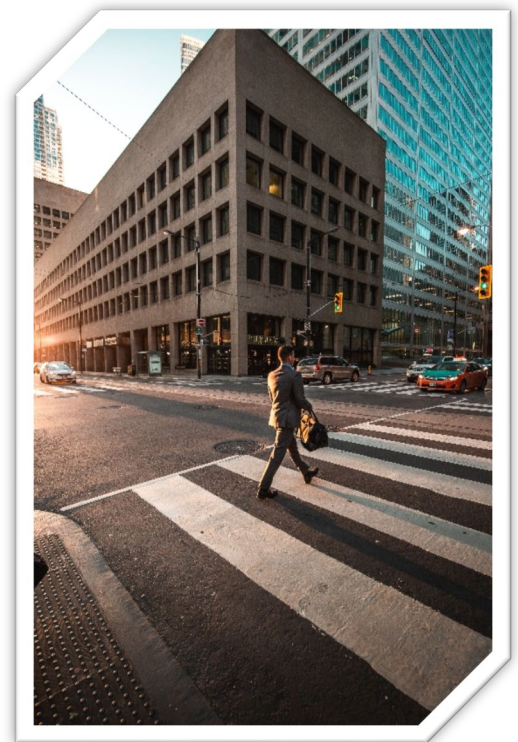
CHANGE MANAGEMENT COMPLEXITY

A simple way to estimate change management complexity is by the degree of change and number of people. This helps you gauge the level of change management support your project needs to ensure you meet your objectives.

DEGREE OF CHANGE FOR IMPACTED PEOPLE

	HIGH ↕ LOW		
HIGH	• High degree of complexity/change for impacted stakeholders • Low number of people impacted	• High degree of complexity/change for impacted stakeholders • Larger number of people impacted
LOW	• Low degree of complexity/change for impacted stakeholders • Low number of people impacted	• Low degree of complexity/change for impacted stakeholders • Larger number of people impacted

FEW ◀▶ MANY

 # OF PEOPLE / LOCATIONS

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Understand your change management initiative

Use this checklist to measure the complexity of your change initiative.

How well can you describe the following?	Pretty Well	A little	Not at all
What is changing?			
Why is this change needed?			
Who is impacted by the changes?			
What leaders need to support and lead through the change?			
What do all stakeholders need to know (and when)?			
What are the benefits to the company, the customer, the team, and the individual team members?			

Level of complexity/risk	Low	Medium	High
Degree of change for organization/stakeholders? (Minor change = Low, Major change = High)			
Number of stakeholders/functions/locations impacted?			
The project timeline has adequate time? (No=H, Yes=L)			
Adequate executive leadership support? (No=H, Yes=L)			
Has approximately 10% (or more) of overall project budget allocated for Change Management? (No=H, Yes=L)			

Add the totals in each column	SIMPLE	MEDIUM	COMPLEX

Use the highest total to approximate the complexity of your project and review the next two pages to understand your options.

Activities & timing for a simple change effort

We recommend the following activities for a project with simple change management needs. Use the timeline to define the milestones for change management activities.

PHASE > Activity	WEEKS BEFORE GO-LIVE	ACTUAL DATE
INITIATE		
Agree to change management approach	-24	
DESIGN		
Engage sponsors & key influencers	-20	
Draft communication plans	-20	
Document change impacts	-20	
Determine training needs	-20	
BUILD		
Update communication plan	-16	
Develop change summary by team	-16	
Develop training	-16	
GO LIVE		
Send project overview to end users	-12	
Send solution overview to end users	-10	
Send go-live communications to end users	-8	
Send training overview to end users	-6	
Schedule training	-4	
Facilitate training sessions	-2	
GO-LIVE DATE		

NOTE: Project duration may change. Please adjust the timeline accordingly.

Frequently asked questions

Here are some common questions we hear at this point in the process.

Now that I read the last two pages, this seems to be more work. *What should I do?*

If you think your Change Initiative is Medium or High complexity, we recommend two key actions:

First, have a candid conversation with your project executive sponsor that the change management effort to ensure a successful project is more extensive than originally thought, and that you need their support to get the right resources to help manage the change (whether internal or external).

Second, reach out to trusted advisors internally and/or externally to see what tools and resources might be available. Even if your company doesn't have a dedicated "OCM" team, there may be templates or tools from previous projects that can be a good starting point. We also recommend reaching out to an external advisor to help you determine the scale of your change effort and to help you begin building a plan.

Why do some change programs succeed while others fail?

The main difference between successful and unsuccessful change programs boils down to leadership. Successful change programs have leaders who sponsor the change, meaning they provide resources, support it publicly and remove obstacles. Other contributing factors include the organization's history of managing change (i.e., past failures make it more difficult to succeed) and the level of proactive change management being employed (i.e., when a change is planned and coordinated, it has a higher likelihood of succeeding than if left to chance).

What characteristics are most important for our leaders to exhibit during the change?

In any change program, it is critical to develop and maintain the support and sponsorship of your executive leadership. A good way of doing this is by setting expectations at the beginning of the project. Key sponsor behaviors include developing & maintaining a sense of urgency, publicly and privately legitimizing & supporting the change, and helping resolve obstacles to success. For more detail, see our Sponsor Expectations and Sponsor Assessment tools.

Next steps

Contact us for help: igniteconsulting@ignitena.com
- We have simple tools, templates and guides that can help with a specific request.
- We can also share additional insight to help you plan your project's change management effort.