
<**PROJECT NAME**>

CHANGE MANAGEMENT PLAN

Version Number: 1.0

Version Date: <mm/dd/yyyy>

Notes to the Author

[This document is a template of a Change Management Plan document for a project. The template includes instructions to the author, boilerplate text, and fields that should be replaced with the values specific to the project.]

- *Blue italicized text enclosed in square brackets ([text]) provides instructions to the document author, or describes the intent, assumptions and context for content included in this document.*
- *Blue italicized text enclosed in angle brackets (<text>) indicates a field that should be replaced with information specific to a particular project.*
- *Text and tables in black are provided as boilerplate examples of wording and formats that may be used or modified as appropriate to a specific project. These are offered only as suggestions to assist in developing project documents; they are not mandatory formats.*

When using this template, the following steps are recommended:

1. *Replace all text enclosed in angle brackets (e.g., <Project Name>) with the correct field document values. These angle brackets appear in both the body of the document and in headers and footers. To customize fields in Microsoft Word (which display a gray background when selected) select File->Properties->Summary and fill in the appropriate fields within the Summary and Custom tabs.*

After clicking OK to close the dialog box, update all fields throughout the document selecting Edit>Select All (or Ctrl-A) and pressing F9. Or you can update each field individually by clicking on it and pressing F9.

These actions must be done separately for any fields contained with the document's Header and Footer.

2. *Modify boilerplate text as appropriate for the specific project.*
3. *To add any new sections to the document, ensure that the appropriate header and body text styles are maintained. Styles used for the Section Headings are Heading 1, Heading 2 and Heading 3. Style used for boilerplate text is Body Text.*
4. *To update the Table of Contents, right-click on it and select "Update field" and choose the option - "Update entire table".*
5. *Before submission of the first draft of this document, delete this instruction section "Notes to the Author" and all instructions to the author throughout the entire document.*

VERSION HISTORY

[Provide information on how the development and distribution of the Change Management Plan will be controlled and tracked. Use the table below to provide the version number, the author implementing the version, the date of the version, the name of the person approving the version, the date that particular version was approved, and a brief description of the reason for creating the revised version.]

Version Number	Implemented By	Revision Date	Approved By	Approval Date	Description of Change
1.0	<Author name>	<mm/dd/yy>	<name>	<mm/dd/yy>	<description of change>

TABLE OF CONTENTS

1 INTRODUCTION.....	4
1.1 Purpose of The Change Management Plan	4
2 CHANGE MANAGEMENT PROCESS	4
2.1 Change Request Process Flow Requirements.....	4
2.2 Change Request Form and Change Management Log	5
2.3 Evaluating and Authorizing Change Requests	5
2.3.1 Change Control Board.....	6
3 RESPONSIBILITIES	6
APPENDIX A: CHANGE MANAGEMENT PLAN APPROVAL.....	7
APPENDIX B: REFERENCES	8
APPENDIX C: KEY TERMS	9

1 INTRODUCTION

1.1 PURPOSE OF THE CHANGE MANAGEMENT PLAN

[Provide the purpose of the Change Management Plan. This document should be tailored to fit the particular project needs.]

The Change Management Plan documents and tracks the necessary information required to effectively manage project change from project inception to delivery.

The Change Management Plan is created during the Planning Phase of the project. Its intended audience is the project manager, project team, project sponsor and any senior leaders whose support is needed to carry out the plan.

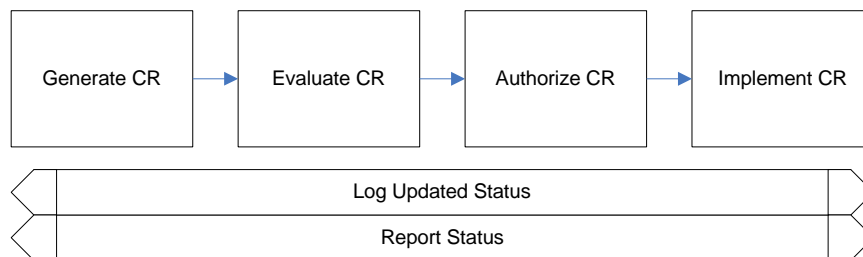
2 CHANGE MANAGEMENT PROCESS

The Change Management process establishes an orderly and effective procedure for tracking the submission, coordination, review, evaluation, categorization, and approval for release of all changes to the project's baselines.

2.1 CHANGE REQUEST PROCESS FLOW REQUIREMENTS

[Outline the project team's agreed upon change request (CR) process flow. The following outlines a generic change request process flow.]

Step	Description
Generate CR	A submitter completes a CR Form and sends the completed form to the Change Manager
Log CR Status	The Change Manager enters the CR into the CR Log. The CR's status is updated throughout the CR process as needed.
Evaluate CR	Project personnel review the CR and provide an estimated level of effort to process, and develop a proposed solution for the suggested change
Authorize	Approval to move forward with incorporating the suggested change into the project/product
Implement	If approved, make the necessary adjustments to carry out the requested change and communicate CR status to the submitter and other stakeholders



2.2 CHANGE REQUEST FORM AND CHANGE MANAGEMENT LOG

[List and define the data elements the project team needs to include on the Change Request Form and in the Change Management Log. At a minimum, the following data should be included on the project's Change Request Form and Change Management Log.]

Element	Description
Date	The date the CR was created
CR#	Assigned by the Change Manager
Title	A brief description of the change request
Description	Description of the desired change, the impact, or benefits of a change should also be described
Submitter	Name of the person completing the CR Form and who can answer questions regarding the suggested change
Phone	Phone number of the submitter
E-Mail	Email of the submitter
Product	The product that the suggested change is for
Version	The product version that the suggested change is for
Priority	A code that provides a recommended categorization of the urgency of the requested change (High, Medium, Low)

2.3 EVALUATING AND AUTHORIZING CHANGE REQUESTS

[In order to evaluate and prioritize a change request, the "priority" and "type" of the change are taken into consideration. Use the first and second tables below to list and define the "priority" and "type" data elements that are applicable for the project. The third table provides examples of commonly used project status types. The list of elements is at the discretion of the project manager.]

Change requests are evaluated using the following priority criteria:

Priority	Description
High	<i><Insert the definition the project assigns to a high priority CR></i>
Medium	<i><Insert the definition the project assigns to a medium priority CR></i>
Low	<i><Insert the definition the project assigns to a low priority CR></i>
<i><priority></i>	<i><Insert the definition the project assigns to this level of priority CR></i>

Change requests are evaluated and assigned one or more of the following change types:

Type	Description
Scope	Change affecting scope
Time	Change affecting time
Duration	Change affecting duration
Cost	Change affecting cost
Resources	Change affecting resources
Deliverables	Change affecting deliverables
Product	Change affecting product
Processes	Change affecting process
Quality	Change affecting quality
<i><change type></i>	<i><define this change type></i>

Change requests are evaluated and assigned one of the following status types:

Status	Description
Open	Entered/Open but not yet approved or assigned
Work in Progress	CR approved, assigned, and work is progressing
In Review	CR work is completed and in final review prior to testing
Testing	CR work has been reviewed and is being tested
Closed	CR work is complete, has passed all tests, and updates have been released.
<status type>	<define this status type CR>

2.3.1 Change Control Board

[A Change Control Board (CCB) is a formally constituted group of stakeholders responsible for approving or rejecting changes to the project baselines. This group may meet on a predefined schedule or on an as needed basis. The table below provides a brief description of personnel acting as the Change Control Board (CCB) and their role/level of authority within that group.]

Role	Name	Contact	Description
<i>[Insert Role]</i>	<i>[Insert Name]</i>	<i>[Insert Contact #]</i>	<i>[Insert Role Description]</i>

3 RESPONSIBILITIES

[Provide a brief description of persons responsible for each step of the change management process for the project.]

Role	Name	Contact	Description
<i>Project Manager</i>			
<i>Change Manager</i>			
<i>[Insert Role]</i>	<i>[Insert Name]</i>	<i>[Insert Contact #]</i>	<i>[Insert Role Description]</i>

Appendix A: Change Management Plan Approval

The undersigned acknowledge that they have reviewed the **<Project Name> Change Management Plan** and agree with the information presented within this document. Changes to this **Change Management Plan** will be coordinated with, and approved by, the undersigned, or their designated representatives.

[List the individuals whose signatures are desired. Examples of such individuals are Business Owner, Project Manager (if identified), and any appropriate stakeholders. Add additional lines for signature as necessary.]

Signature: _____ Date: _____
Print Name: _____
Title: _____
Role: _____

Signature: _____ Date: _____
Print Name: _____
Title: _____
Role: _____

Signature: _____ Date: _____
Print Name: _____
Title: _____
Role: _____

APPENDIX B: REFERENCES

[Insert the name, version number, description, and physical location of any documents referenced in this document. Add rows to the table as necessary.]

The following table summarizes the documents referenced in this document.

Document Name	Description	Location
<i><Document Name and Version Number></i>	<i><Document description></i>	<i><URL or Network path where document is located></i>

APPENDIX C: KEY TERMS

The following table provides definitions and explanations for terms and acronyms relevant to the content presented within this document.

Term	Definition
<i>[Insert Term]</i>	<i><Provide definition of term and acronyms used in this document.></i>