Change management plan

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Introduction

The Change Management Plan plays a crucial role in ensuring the structured and efficient handling of changes throughout the project lifecycle. It serves to document and track vital information needed to manage project changes effectively from inception to delivery.

Purpose of the Change Management Plan

The primary purpose of the Change Management Plan is to establish a comprehensive framework that guides the management of changes within the project. This includes:

- Outlining the procedures for submitting and processing change requests.
- Detailing the roles and responsibilities of project stakeholders in the change management process.
- Ensuring that changes are reviewed, evaluated, and implemented in a controlled manner, minimizing impact on project goals and objectives.

The Change Management Plan is developed during the project's Planning Phase and is intended for:

- The **Project Manager**, who oversees the implementation of the Change Management Plan.
- The **Project Team**, who are responsible for executing change-related activities in accordance with the plan.
- The **Project Sponsor** and **Senior Leaders**, whose support and approval are essential for carrying out the plan.

Change Management Process

The Change Management Process is designed to provide a systematic approach to managing all changes to the project's baselines. This process ensures:

- An **orderly procedure** for tracking the submission, coordination, review, evaluation, categorization, and approval of changes.
- The maintenance of project integrity and consistency through the controlled implementation of changes.
- Clear communication and documentation of changes, facilitating transparency and accountability within the project team and among stakeholders.

Through this process, the project can adapt to evolving requirements and unforeseen challenges while maintaining alignment with project objectives and stakeholder expectations.

Change Request Process Flow Requirements

The Change Request Process is designed to ensure that changes are managed effectively and implemented efficiently. The process involves several key steps, each with specific actions and responsibilities.

Step	Description
Generate CR	A submitter fills out a Change Request (CR) Form and sends it to the Change Manager for initial review and logging.
Log CR status	The Change Manager logs the CR in the CR Log, ensuring its status is accurately updated throughout the process.
Evaluate CR	Project personnel assess the CR, estimating the effort required to implement the change and developing a proposed solution.
Authorize CR	The proposed change undergoes a review for approval. If approved, authorization is granted to proceed with the change.
Implement CR	Following approval, the necessary adjustments are made to implement the change, which may involve modifications to project plans, deliverables, or other components.
Log updated status	As the CR progresses, its status in the CR Log is updated to reflect the latest developments, including completion of the change.
Report status	The final status of the CR, including details of the implementation and its impact, is communicated to the submitter and other stakeholders.

This structured approach ensures transparency, accountability, and efficiency in managing and implementing changes within the project.

Change Request Form and Change Management Log

The Change Request Form and the Change Management Log are essential tools for documenting and tracking changes throughout the project. Below are the elements typically included in each Change Request (CR) Form:

Element	Description
Date	The date when the CR was created.
CR#	A unique identifier assigned by the Change Manager.
Title	A concise title for the change request.
Description	Detailed description of the desired change, including its impact or benefits.
Submitter	Name of the person completing the CR Form and who can provide further details.
Phone	Contact phone number of the submitter.
E-Mail	Contact email address of the submitter.
Product	The specific product that the suggested change pertains to.
Version	The version of the product that the change is proposed for.
Priority	A code indicating the urgency of the change (e.g., Critical, High, Medium, Low, Insignificant).

Evaluating and Authorizing Change Requests

Change requests are evaluated based on the following priority criteria, ensuring that each is addressed appropriately according to its urgency and impact:

Priority	Description
Critical	Changes that affect key business processes or systems, potentially requiring downtime. These changes might necessitate significant adjustments to project requirements or structure and demand immediate attention due to their impact on users.
High	Important issues that impact the ability to deliver fundamental product functionalities or have a financial impact, affecting multiple departments and all users.
Medium	Changes that do not impact critical processes and involve requested features by clients. While not critical, these changes cannot be easily dismissed and may cause minor impacts.
Low	Minor problems or cosmetic changes that do not significantly affect daily operations and for which workarounds exist.
Insignificant	Minor feature requests or add-ons proposed by clients that do not impact the system's functionality or integrity if excluded.

This structured approach to evaluating and authorizing change requests ensures that each change is assessed fairly and implemented in a way that best supports the project's objectives and stakeholder needs.

Change Types and Status Types for Change Requests

Change requests are carefully evaluated and classified according to the nature of the change they propose. Each change request is assigned one or more of the following change types based on its impact:

Type	Description
Scope	Change affecting the scope of the project or product.
Time	Change affecting the timeline or milestones.
Duration	Change affecting the duration of tasks or activities.
Cost	Change affecting the overall budget or specific costs.
Resources	Change affecting the allocation or availability of resources.
Deliverables	Change affecting the expected outputs or results.
Product	Change affecting the features or functionality of the product.
Processes	Change affecting the established workflows or procedures.
Quality	Change affecting the quality standards or criteria.
Availability	Change affecting the uptime or accessibility of the application to the public domain.
Reliability	Change affecting the system's reliability or integrity.
Scalability	Change affecting the system's ability to handle growth or increased load.
Maintainability	Change affecting the ease of maintaining or updating the system.

Additionally, each change request is assigned a status to track its progress through the change management process. The possible status types are:

Status	Description
Open	The CR is entered/open but has not yet been approved or assigned.
Work in Progress	The CR has been approved, assigned, and work is currently underway.
In Review	The CR work is completed and is undergoing final review before testing.
Testing	The CR has been reviewed and is currently being tested.
Closed	The CR work is complete, has passed all tests, and any updates or changes have been implemented and released.
On Hold	The CR has been approved and assigned, but work is temporarily paused.

This structured approach to categorizing change requests by type and status ensures clear communication and efficient tracking of changes throughout the project lifecycle.

Change Control Board and Responsibilites

The Change Control Board (CCB) plays a crucial role in overseeing and making decisions on proposed changes within the project. Below are the roles within the CCB, their responsibilities, and contact information:

Role	Description
Project Manager	Overall responsibility for project execution and change management.
Risk Manager	Ensures all project plan changes are thoroughly assessed for risk, with strategies established to minimize or eliminate risks.
Client Representative	Represents client interests, recommends potential products or services, maintains user accounts, and resolves customer complaints/queries.
Finance Manager	Monitors cash flow, ensures compliance with statutory and financial obligations, and keeps track of market trends.
Test Manager	Ensures all tests adhere to software functional requirements, designs testing strategies, and executes test procedures.
Development Manager	Ensures requested changes can be completed on time, establishes software development standards, and promotes best practices for high-quality software delivery.

The CCB members work collaboratively to ensure that all changes are evaluated, prioritized, and implemented in a manner that aligns with the project's objectives and stakeholder expectations.

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