# Change Management Plan

**Project Name or Identification**

CDI-Viz Dashboard

**Prepared by**:

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# Introduction

A proper approach to change management enables a smooth adoption and implementation of a new IT system. Specifically, it can manage resistance, minimize disruptions, facilitate adoption, ensure alignment, mitigate risks, and enhance communication. The purpose of this document is to bridge the gap between the development phase and end-users by formulating and executing a change management plan.

# Stakeholders

| Stakeholder | Willingness (1-5) | Readiness (1-5) | Ability to Change (1-5) |
|---|---|---|---|
| Morton Analytics | 5 | 5 | 5 |
| Montana Data Consultants | 5 | 5 | 5 |
| Dr. Clouse | 5 | 4 | 5 |
| Potential Morton Analytics Clients | 4 | 3 | 3 |
| Public Health Policy Makers | 5 | 4 | 3 |
| Healthcare Administrators | 4 | 4 | 3 |
| Health Care Professionals | 5 | 4 | 3 |
| General Public | 3 | 3 | 3 |

# Strategies for Change

The change strategy on this project will be the environmental-adaptive approach. This approach adapts to the unique needs of each stakeholder group. Additionally, this approach tailors communication and support to accommodate varying levels of readiness and capability. This strategy will better accommodate the team's work and school schedules, and the client is very flexible both with their time as well as with offering resources and support. The environmental-adaptive approach promotes collaboration and will allow for easier user adoption, as all team members, as well as Morton Analytics, will be highly familiar with the backend and usage of the product.

# Implementation Steps and Tracking

1. Initiate Change
   - Establish a change initiative being sure to communicate the reasons and benefits.
   - Clearly articulate the vision and goals of the change

2. Maintain Communication
   - Employ the communication plan previously established keeping the necessary stakeholders informed

- Address concerns and questions about the change in a timely and clear manner

3. Address Resistance
   - Identify and address all sources of resistance
   - Modify the change management plan as needed based on resistance

4. Execute Change
   - Implement the change according to the established timeline

5. Monitor Change
   - Conduct reviews with the project team and discuss successes and challenges of the change

6. Gather Feedback and Adjust Accordingly
   - Gather feedback from the project team and stakeholders about the change process as well as the change itself
   - Adjust based on feedback
   - Address unexpected issues promptly

## Evaluation and Lessons Learned

For some members of the team, this was the first start-to end IT project completed. With thorough documentation, defined roles for each team member, and an open-ended vision for the final product, this project gave the entire team new experience in time management, writing, professional communication, and data acumen. Below are the four most important lesson learned from the planing, management, and execution of the data project:

1. Evaluate the effectiveness of the change management plan through post-implementation reviews, surveys, and feedback from stakeholders.
2. Analyze successes, challenges, and areas for improvement to identify lessons learned.
3. Document findings and recommendations for future projects, incorporating feedback into organizational best practices.
4. Continuously refine and adapt change management strategies based on insights gained from the evaluation process.