Change management template

This change management template serves as a strategic guide to navigate the complexities of organizational transformation.

Whether you're implementing new technologies, revamping processes, or restructuring teams, successful change hinges on meticulous planning, communication, and tracking.

If you work with teams across different departments, use this template as a central document to help foster clarity, consistency, and collaboration throughout the change journey. By scrolling further down the page, you’ll find another table with examples to help guide you.

But first, here are some prompts to help you get started

| **Item** | **Description** | **Responsibility** | **Start date** | **End date** | **Status** | **Comments/notes** |
| --- | --- | --- | --- | --- | --- | --- |
| **Objective** | Clear definition of the change of goal. | Who owns the objective? | When is this objective set to begin? | Expected completion date. | Not Started/ In Progress/ Completed | Any relevant notes or updates. |
| **Stakeholders** | List of individuals/groups affected. | Who's in charge of liaising? | Initial contact date. | Date of buy-in or approval. | Not Contacted/ Engaged /Approved | Feedback or concerns from stakeholders. |
| **Communication** | What needs to be communicated? | Who is responsible for communication? | Communication initiation date. | Next update or feedback session. | Not Started/ Ongoing /Completed | Any specific feedback or communication outcomes. |
| **Training** | What training is required? | Who will conduct the training? | Training start date. | Training completion date. | Not Started/ In Progress /Completed | Feedback on training sessions. |
| **Resources** | Resources needed for the change. | Who will provide or manage these? | Resource provision start date. | Expected date of all resources being available. | Not Started/ In Progress /Completed | Any issues or updates related to resources. |
| **Risks & mitigations** | Potential risks identified. | Who's responsible for addressing these risks? | Risk identification date. | Date by which mitigation is to be implemented. | Not Addressed/ In Progress /Mitigated | Notes on risk evolution or mitigation success. |
| **KPI’s & monitoring** | Key Performance Indicators. | Who will measure and report? | KPI tracking start date. | Next evaluation date. | Not Started/ Ongoing /Achieved Feedback or results related to KPIs. | Feedback or results related to KPIs. |

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| --- | --- | --- | --- | --- | --- | --- |
| **Objective** | Implement a new CRM system to improve lead tracking and increase sales efficiency. | RevOps Manager | 2023-01-15 | 2023-03-15 | In Progress | Initial team briefing completed. |
| **Stakeholders** | Sales team, marketing team, IT department. | Change Management Lead | 2023-01-10 | 2023-01-25 | Engaged | Sales team expressed concerns about data migration. |
| **Communication** | Introduction to new CRM features, benefits, and transition timeline. | Communication Lead | 2023-01-18 | 2023-02-05 | Ongoing | Bi-weekly updates scheduled. |
| **Training** | Training sessions on using the new CRM system. | Training Lead | 2023-02-10 | 2023-02-25 | Not Started | Training modules being developed. |
| **Resources** | New CRM software licenses, training materials, IT support. | IT Manager | 2023-01-15 | 2023-01-30 | In Progress | 75% of licenses purchased. |
| **Risks & mitigations** | Potential data loss during migration, resistance to change from staff. | Risk Analyst | 2023-01-12 | 2023-02-15 | Not Addressed | Plan to backup all data and hold a Q&A session for concerned staff. |
| **KPI’s & monitoring** | Successful data migration, number of trained staff, increased lead tracking efficiency. | Data Analyst | 2023-02-28 | 2023-03-15 | Not Started | Baseline data collected. |