Change Management Plan Template

Change can be tough, but this template has got your back! It's designed to make managing change within your organization easy and efficient. It will guide you through the change management process, from identifying the rationale for the change to assessing risks and opportunities. Use this template alongside our guide to cloud adoption and change management and you'll be equipped with all the tools and resources needed to navigate change effectively and ensure organization-wide (or team-wide) adoption of any change you roll out.

1. Project details

This is where you provide all the essential information about the change you are planning to make within your organization. Don't worry if you don't have all the answers right away - this is a work in progress! Just be as specific as you can with the information you have at this point. The more details you can provide, the more effective your change management plan will be. Remember, the purpose of this section is to help you and your organization stay focused and aligned throughout the change process. So, let's get started - fill in the details and get ready to navigate change like a pro.

What is the type of change you are making / planning to make in your organization?	What is the project about?
Why are you making this change?	What is driving this change?
Size of change	How many people will be impacted? How many systems are changing? How many new systems are being introduced?
Change lead	Who is the person in charge of defining and driving the change management plan?

2. Set your vision and define success

Building a shared understanding and gaining alignment on the change initiative is vital to ensuring the success of your rollout, so take your time and be thoughtful when answering the following questions. When you're finished, you'll be able to define a clear vision for your change initiative and set a path for achieving success.

What is your vision for this change?	What are we trying to achieve with this change?
What does success look like after the change has been implemented?	What is the expected outcome of this change? What does the end state look like? What's in it for them? *This is the vision you share with your stakeholders.*
Who will be impacted and how?	What is changing for whom? How will this change uniquely impact specific groups?
What are the key mindset shifts that need to happen for the change to be successful?	What changes in mindset are necessary for individuals to achieve success? In other words, what new ways of thinking do people need to adopt in order to reach the desired level of success? *This will impact your training and communication plan.*
How will you measure success of this change?	What are the key metrics you will monitor to determine that the change has been successful?
What are the risks of this change not being successful?	What happens if this change is not successful?
What are the risks of this change not being successful?	What's standing in your way?

3. Your adoption team

Now that you've established your vision, it's time to identify those who will help you turn that vision into a reality. These are the individuals who will be responsible for driving and sponsoring the change.

Executive sponsorship is critical to the success of any change initiative, and it's important to identify and engage the right people from the start. By doing so, you'll be able to secure the necessary resources, obtain buy-in, unify the organization under a shared vision for success, and gather valuable expertise to ensure the change initiative is aligned with business and technical requirements.

Who is responsible for the change?	Name of person/team responsible for implementing the change and the success of the change
What are the roles of each person responsible for the change?	List of responsibilities for each person/team implementing the change
Who is sponsoring the change? Why is their sponsorship critical to the success of this change?	Name of the executive sponsor(s) and why their sponsorship is so important. If you don't have an executive sponsor identified - who might you tap as a sponsor?
Who are the technical and business SMEs you need to enroll to ensure project success, and why?	Name of technical SMEs and why they are important Name of business SMEs and why they are important

4. Scope the rollout

This is where the rubber meets the road and your adoption team begins to implement the changes that you've envisioned. Take the time here to carefully consider the style of rollout you'll choose and the key use cases of your new tool/process.

There are two primary styles of rollout - big bang and phased. Big bang rollouts are ideal when time is of the essence and change is urgent, while phased rollouts are more gradual and enable teams to adapt to the change more smoothly - we recommend a phased rollout for that reason.

Beyond the style of rollout, you must also ensure the change is aligned to your users' needs. To do this, identify the key use cases for the new tools/processes you will roll out. By scoping your rollout in this way, you'll increase the level of adoption and overall rollout success.

What style of rollout are you planning, and why?	Phased rollout or big bang? Why?
How have you managed the rollout of other technology/processes/ways of work etc. in the past?	Is this consistent with how you've rolled out other tools in the past? What worked, and what didn't?
What are the key use cases for this tool/ process? What departments/teams will be the primary users?	Identify 2-3 use cases for the tool, and why the change will help make these use cases easier to achieve. What teams will be making a change?

5. Training and support plan

Without adequate training and support, individuals may struggle to understand new tools/ processes, which can lead to resistance and low adoption. In this section, you'll consider the type of training your users will need and how it will be delivered. Will it be in-person, virtual, or a combination of both? We also encourage you to consider the timing and frequency of training to ensure that users have ample opportunity to learn and ask questions along the way.

What type of training do you want to offer?	☐ In-person training sessions ☐ Train the trainer sessions ☐ Lunch and learns / office hours / drop-in Q&A sessions ☐ Online training (via Atlassian University) ☐ Online training (custom built by your organization) ☐ Other:
Are there specific trainings needed for different departments?	Will you need to create different trainings for different departments/teams? *Consider: admin training vs. end user training, developer vs. business user training, tool specific training*
What will users know, do, and feel as a result of the training?	*Hint: think of all the things a customer needs to know and be equipped to do in order to feel confident about the change.*
Who is responsible for training?	Who will be developing and/or running the training sessions? What resources do they need to be successful?
How will you support this change?	How will your team support this change? ☐ Teams / Slack Channels ☐ Helpdesk / Jira Service Management Portal ☐ Other:

6. Communications plan

Effective communication is the cornerstone of successful change management as it ensures that stakeholders are informed about the change and understand how it will impact them - it helps to build support and buy-in for the change across the organization.

How will you communicate this change to impacted teams / individuals?	☐ E-mail ☐ Slack / Teams ☐ Manager 'phone tree' (ask managers to reinforce the message shared via e-mail, Slack/Teams with their individual teams) ☐ 1:1 communications to highly impacted individuals
How does the message need to change for different departments / teams?	Add examples for why you might need specific communications for different departments vs. one org-wide message
When will you communicate this change?	*Hint: remember the power of repetition and early notice*
Who will communicate this change?	How will you use your executive sponsor to enroll others in the change? How can you leverage department leads to communicate the change?
Do you anticipate any resistance to this change? How can you incorporate this into your communications?	Change fatigue, organizational aversion to change, etc - how might you anticipate resistance and tackle it head on in your communications?
How will you communicate after the launch?	How will you notify users of new features that they can use, additional training, opportunity to become a Champion, etc?

TIP: Communication should be frequent and delivered through various channels to increase awareness and ensure that everyone has ample time to process how the change will impact them, so they can plan accordingly. Your communications plan should be tailored to your organization's specific needs and should include targeted messaging to different groups or departments as needed. Looking for a place to start? Check out these **modifiable email templates** we've developed.

7. After the launch: monitoring usage and adoption

Congratulations - you've worked through this template and are ready to roll out your change. But, what happens after your rollout? The work doesn't stop there.

Change is not a one-time event, but rather an ongoing journey. By collecting and analyzing data on how your organization is using the new tools/processes, you can identify areas that need improvement and make data-driven decisions to keep your users engaged and motivated. Don't forget to look beyond the quantitative data and consider the experiences of your teams. We recommend gathering feedback through surveys and other channels. This feedback will help you understand how the change is impacting the organization at the team level so you can adjust and accommodate.

How will you monitor usage and adoption following the launch?	Consider using audit logs and sample surveys.
If adoption is lower than expected, what will you do to improve adoption?	Will you offer additional training? More targeted communications to low adopters? Push for additional executive sponsorship and enforcement?
How will you report on the success?	What are the key metrics you will share? Who will you share this with? How often will you share?

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