

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 [cloud adoption guide](#) 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. Capture project details

Capture the essential information of your planned organizational change. Don't worry if you don't have all the answers right away; just add what you know now and update as needed. The more specific you are, the more effective your change management plan will be.

Keep in mind that this is an opportunity to remind your users why the change is happening and what benefits it brings, such as faster results, better collaboration, or access to new features. 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 shared understanding and alignment is key to a successful rollout. Answer the following questions thoughtfully to define a clear vision and path for your change initiative. Emphasize and articulate the benefits for individuals, teams, and the organization to drive awareness and excitement.

What is your vision for this change?	What is the project about?
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? <i>This is the vision you share with your stakeholders.</i>
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? <i>This will impact your training and communication plan.</i>
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. Assemble your rollout team

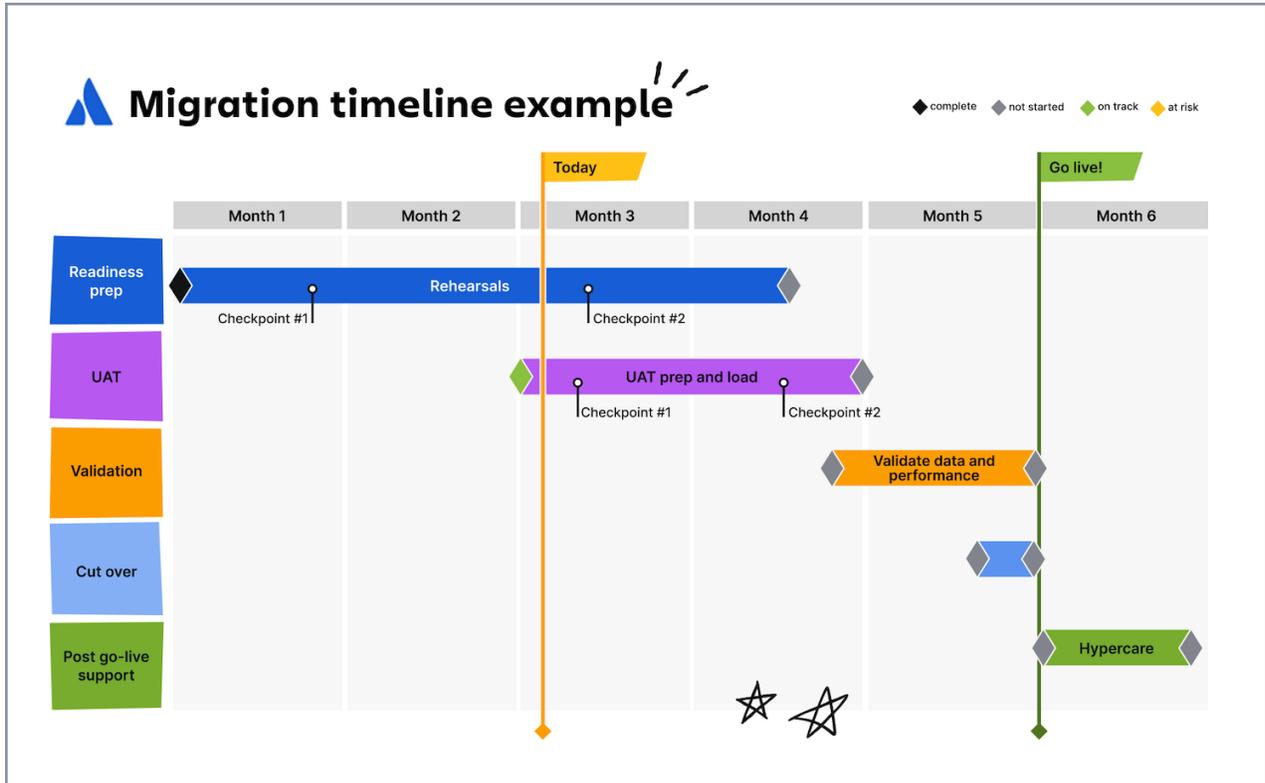
Now that you’ve established your vision, it’s time to identify those who will help you turn that vision into a reality. These are the individuals who will be responsible for driving and sponsoring the change.

Executive sponsorship and Champions are essential for successful change. Identify and involve a comprehensive rollout team early on to secure resources, gain buy-in, advocate change, amplify messages, and ensure alignment with business and technical needs. Use them as partners to understand where messaging can improve.

<p>Who is responsible for the change?</p>	<p>Name of person/team responsible for implementing the change and the success of the change</p>
<p>What are the roles of each person responsible for the change?</p>	<p>List of responsibilities for each person/team implementing the change</p>
<p>Who is sponsoring the change? Why is their sponsorship critical to the success of this change?</p>	<p>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?</p>
<p>Who are the technical and business SMEs you need to enroll to ensure project success, and why?</p>	<p>Name of technical SMEs and why they are important</p> <p>Name of business SMEs and why they are important</p>

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.



Traditionally, there are two main rollout styles: Big bang (also known as **lift and shift**) and phased. Big bang rollouts are best for urgent changes, while phased rollouts allow teams to adapt gradually.

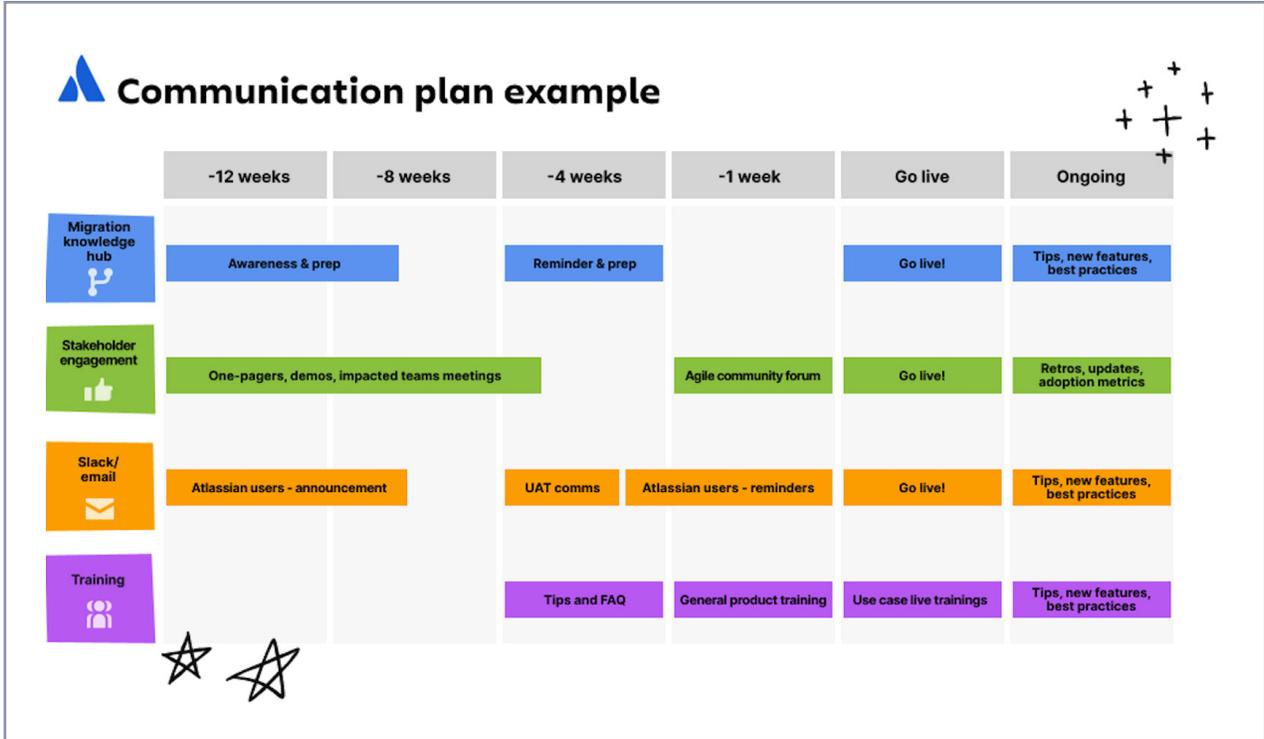
For organizations with 1,000 or more cloud licenses, Atlassian offers a faster, complimentary option called the **FastShift program**. FastShift provides dedicated support from Solution Partners and Advisory Services to help reduce migration timelines by up to 3x.

Regardless of rollout style, align the change with user needs by identifying key use cases for new tools or processes. This targeted approach boosts adoption and overall 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. Communications plan

Effective communication is essential for successful change management. It keeps stakeholders informed, helps them understand the impact, and builds support and buy-in across the organization.



<p>How will you communicate this change to impacted teams / individuals?</p>	<ul style="list-style-type: none"> <input type="checkbox"/> E-mail <input type="checkbox"/> Slack / Teams <input type="checkbox"/> Manager 'phone tree' (ask managers to reinforce the message shared via e-mail, Slack/Teams with their individual teams) <input type="checkbox"/> 1:1 communications to highly impacted individuals
<p>How does the message need to change for different departments / teams?</p>	<p>Add examples for why you might need specific communications for different departments vs. one org-wide message</p>

<p>When will you communicate this change?</p>	<p><i>Tip: remember the power of repetition and early notice</i></p>
<p>Who will communicate this change?</p>	<p>How will you use your executive sponsor to enroll others in the change?</p> <p>How can you leverage department leads to communicate the change?</p>
<p>Do you anticipate any resistance to this change? How can you incorporate this into your communications?</p>	<p>Change fatigue, organizational aversion to change, etc - how might you anticipate resistance and tackle it head on in your communications?</p>
<p>How will you communicate after the launch?</p>	<p>How will you notify users of new features, additional training, opportunity to become a Champion, etc?</p>

TIP: Communicate often and use multiple channels to keep everyone informed and give teams time to prepare. Tailor your plan to your organization's needs, with targeted messages for different groups. Regular updates that reinforce the reasons for change, available support, and feedback options will help address resistance. Looking for a place to start? Check out these [modifiable email templates](#) we've developed.

6. 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?	<input type="checkbox"/> In-person training sessions <input type="checkbox"/> Train the trainer sessions <input type="checkbox"/> Lunch and learns / office hours / drop-in Q&A sessions <input type="checkbox"/> Online training (via Atlassian University) <input type="checkbox"/> Online training (custom built by your organization) <input type="checkbox"/> Other:
Are there specific trainings needed for different departments?	Will you need to create different trainings for different departments/teams? <i>Consider: admin training vs. end user training, developer vs. business user training, tool specific training</i>
What will users know, do, and feel as a result of the training?	<i>Hint: think of all the things a customer needs to know and be equipped to do in order to feel confident about the change.</i>
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? <input type="checkbox"/> Teams / Slack Channels <input type="checkbox"/> Helpdesk / Jira Service Management Portal <input type="checkbox"/> Other:

TIP: Create a centralized learning hub and give your users access to it. The learning hub acts as a one-stop shop and a source of truth for everything they need to ensure a successful transition to Atlassian Cloud. Take advantage of our in-product features like custom [Jira Onboarding](#) to showcase your hub.

7. User acceptance testing

Adoption succeeds when teams see real problems solved. Work with both business and technical SMEs to uncover pain points across teams and identify where processes slow down or work gets lost. These challenges will inform you of which use cases matter most to each department.

Once you have prioritize use cases and departments based on business impact and team readiness, define a [Minimum Viable Product \(MVP\)](#) that covers ~80% of daily tasks and business-critical workflows. Then, run [User Acceptance Testing \(UAT\)](#) with Champions, power users, admins, and at least one representative from each key department to validate that workflows, integrations, and key features perform as expected.

What pain points have you identified across departments?	Which departments will you prioritize first? Where do processes slow down or break? What could be improved?
What use cases will you implement by department?	What specific use cases matter most to Marketing, HR, Legal, Operations, or other key departments? How do these use cases solve the challenges you identified?
What is your Minimum Viable Product (MVP)?	What are the essential features and workflows that teams must have on day one?
Who will participate in your UAT pilot and what will you test?	List Champions, power users, admins, and department representatives. What workflows, integrations, and features are critical to validate?
What is your go/no-go decision criteria for launch?	What does success look like at the end of UAT? What issues would delay your launch? How will you decide if you're ready to proceed?

8. 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. We recommend gathering feedback through surveys and other channels.

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?