Template

Change Management Checklist

Change: <Insert change title>
Date: <Insert date>

The Change Management Checklist should be used to ensure that the three elements of change – the project, the change, the people (employees) – have been addressed.

1. Background/Context.

<Describe background/context. Use as much space as is needed.>

2. Objective.

<Describe background/context. Use as much space as is needed.>

3. Change management checklist.

| **No.** | **Task identified.** | **Planned completion date.** | **Done. Y/N** | **Date completed.** |
| --- | --- | --- | --- | --- |
| 1 | Target outcomes agreed. |  |  |  |
| 2 | Success measures agreed. |  |  |  |
| 3 | Outputs agreed. |  |  |  |
| 4 | Governance agreed. |  |  |  |
| 5 | Reporting requirements agreed. |  |  |  |
| 6 | Resources approved and allocated:* Financial;
* Staff (Permanent/Contract);
* External (Consulting/Supplies).
 |  |  |  |
| 7 | Assumptions and constraints documented. |  |  |  |
| 8 | Risks and issues identified (Risk Management). |  |  |  |
| 9 | Related projects identified. |  |  |  |
| 10 | Stakeholders identified. |  |  |  |

Change management checklist (continued).

| **No.** | **Task identified.** | **Planned completion date.** | **Done. Y/N** | **Date completed.** |
| --- | --- | --- | --- | --- |
| 11 | Project activities and milestones documented. |  |  |  |
| 12 | Business systems plan documented. |  |  |  |
| 13 | Communication Strategy documented. |  |  |  |
| 14 | Communication materials prepared. |  |  |  |
| 15 | New procedures documented. |  |  |  |
| 16 | Training Plan documented. |  |  |  |
| 17 | Training materials prepared. |  |  |  |
| 18 | Organisational readiness assessment. |  |  |  |
| 19 | Resistance mitigation plan documented. |  |  |  |
| 20 | Key performance indicators agreed. |  |  |  |
| 21 | Review plan in place for ongoing feedback and monitoring. |  |  |  |

Other change management tasks identified.

| **No.** | **Task identified.** | **Planned completion date.** | **Done. Y/N** | **Date completed.** |
| --- | --- | --- | --- | --- |
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4. Prepared by/Accepted by.

Prepared by (for acceptance): <Insert name>

Title: < Insert title> Date: <insert date>

Accepted by: (for release): < Insert name>

Title: < Insert title> Date: <insert date>