Change Management Plan: How to Make One That Works



In a perfect world, successful organizational change would be accomplished with the flick of a few switches and a software reboot or two.

But even in the age of digital transformation, businesses are driven by human beings, and the "people side of change" requires careful consideration of stakeholder expectations, securing buy-in from both management and team members, bringing everyone onto the same page with regard to new technologies, revamped organizational structure, evolving job roles, etc.

As a result, for many businesses, the change management process can be more demanding than integrating the new policies, procedures, and technologies that support the desired change.

Fortunately, while humans may be resistant to change, they're not immune—especially if they feel like they're part of the process, understand what's happening, how it will happen, and *why* the changes are being made (e.g., how the proposed change will benefit the company and themselves).

Successful change management *is* possible, provided you take the time to develop and implement an effective change management plan beforehand.

What is a Change Management Plan?

The contents, in this case, are written on the tin, so to speak. As a concept, change management focuses on helping stakeholders (generally management and team members, but also external parties such as vendors, investors, and clients) within a company or other organization:

- Understand the nature of proposed changes, the benefits they will provide, and the expectations and responsibilities that will accompany the changes for all parties.
- Support and adapt to these changes.

- Follow the course set by the change management plan (the change "roadmap") and participate in evaluating its success so as to provide insights useful in securing additional positive changes for the organization.

Different types of changes require different change management processes. Adding a single new task to an established process will likely require only some basic updates to existing training, for example.

But large-scale initiatives, such as digital transformation management, are themselves part of larger business process management initiatives, designed to effect substantial and enduring change at the organizational level.

The changes wrought are often complex, numerous, and difficult to contextualize without additional information and guidance from leadership and subject matter experts.

In these instances, a formal change management plan—the roadmap that will both guide the desired changes and secure buy-in from stakeholders—is both highly recommended and almost certainly required.

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Deciding Whether You Need a Change Management Plan

Humans are creatures of habit, and even modest changes in an organization will likely require some measure of change management to ensure a smooth transition. But you can gauge whether or not you need to create and implement a full change management plan by answering three simple questions:

1. Does the proposed change affect the entire organization?
2. Does the proposed change significantly alter existing business processes?
3. Does the proposed change affect customer service, support, or relations?

If the answer to any—or especially all—of these questions is "yes," then a change management plan is in order.

Core Components of a Change Management Plan

At its core, effective change management shares many similarities with effective project management. Substantial organizational change is effectively a large project, and so project managers can use their skillset as a "template" for building a change management team and drafting an effective change management plan.

Every business has its own unique needs and goals. But generally speaking, a change management plan will consist of four primary parts familiar to project managers: Objectives/Goals, Communication, Resistance Management, and Education/Training.

1. Objectives/Goals

Knowing what needs to change, how you want to make it happen, and the steps you'll need to take in helping your team accept and adopt those changes kickstarts the change management process.

Every change management plan is built around ensuring everyone within the organization is aware of the changes to come and helping them engage effectively during the implementation.

Establishing an end-to-end roadmap, with clear benchmarks and milestones, helps your change management team track and evaluate their progress. At this stage, the team will also establish the key performance indicators (KPIs) they'll use to:

- Evaluate the overall success of the project.
- Identify areas in need of further refinement or correction (e.g., the software transition was successfully completed, but some teams are actively circumventing the new system because it's "too complicated" or "inconvenient"; further training and compliance assurance is required.)
- Establish new benchmarks based on iterative continuous improvement. Change is only successful and positive, after all, if it persists.

2. Communication

Nobody wants to buy a pig in a poke, and when staff (or management, or suppliers) feel as though they don't have all the information they need to engage with and support change, they may complain or even actively resist it. When it comes to organizational change, everyone's suddenly from Missouri.

Communication, or rather *effective* communication, is essential to successful change management. A winning communication plan:

- Is clear, comprehensive, and collaborative, welcoming feedback and questions and striving to dispel misconceptions. It clearly delineates the changes involved, the benefits they will bring, and why such a substantial change is happening when and as it is.
- Provides accurate and complete information in real time for the life of the project.
- Is diverse and purpose-built. Company-wide updates provide general information, while departmental or team-focused communiques can dig deeper to provide the relevant specifics. Q&A sessions and seminars can prove invaluable, as they validate staff as partners in the process and the feedback they provide can reveal hitherto-concealed obstacles to adoption and implementation.

3. Resistance Management

Change can be scary. It's inherently risky, and gains additional risk in the form of stakeholders who are uncomfortable with the change and therefore resist it in some way.

An effective change management plan incorporates strategies designed to acknowledge and alleviate concerns driving resistance. Different resistors will have different reasons for their resistance, but clear and honest communication, respectful acknowledgement of the difficulty of change, and a comprehensive breakdown of why the change is happening, how it supports the company's goals, and why compliance is essential, will go quite a long way.

4. Education/Training

This component of the change management process is a natural outgrowth of the communication and resistance management sections. Often, resistance stems from ignorance and uncertainty. Providing comprehensive training, full documentation, and ongoing support staff who can answer questions and provide refreshers as needed will help everyone get comfortable with the changes.

If you're at the early stages and concerned about securing executive buy-in from the C-suite, the same principles apply. Being able to show the concrete short- and long-term benefits and value of (for example) implementing a comprehensive procurement solution, and having subject matter experts (SMEs) on hand to provide detailed clarifications as needed, will make it much easier to secure executive support. This, in turn, will simplify change management for the rest of the organization, as having senior management on board to provide both encouragement and guidance will help the rest of the team join in.

How to Create Your Own Change Management Plan

It's helpful to think of the change management process as both part of the overall project being implemented *and* a separate, dedicated project with its own goals, benchmarks, and deliverables. Those factors should of course align with the larger goals of the main project itself, but should also provide a corrective framework where necessary to ensure success.

Step One: Establish Your Goals

In order to build an effective change management model and strategy, you should have a crystal clear understanding of:

- The project scope.
- The nature of the changes being made, any new processes, tools, and technologies involved, and how the latter three support or empower the first.
- Internal and external stakeholders affected.
- Project milestones and their associated costs, in detail.

- The metrics (KPIs) used to evaluate the relative success or failure of the project, including specific goals and metrics for measuring awareness and adoption rates.

Step Two: Build Your Team

Your change management team will likely be assembled from diverse sources within your organization, and may involve external parties such as consultants. Ideally, you'll have people who occupy leadership positions, and SMEs providing the in-depth knowledge and experience required to bring the rest of the team up to speed as well as provide support and answers for the rest of the organization before, during, and after implementation.

Even if your team is coming from a wide range of business units or departments, you'll likely need dedicated resources. Make sure your team has the equipment, software, and services they need by mapping out a budget.

Step Three: Craft Your Plan

Every plan begins with a timeline and a task list. In change management, both of these items must be as specific as possible while still flexible enough to account for the unexpected. Every task should correspond to a location on the timeline. Connecting other information, such as cost/budget data (along with any interdependencies) will make it easier to prioritize any required changes and simplify accounting and performance analysis, too.

The plan should include detailed communication and resistance management sub-plans.

Project management software is another valuable asset, particularly if it integrates with your other software systems (e.g., procurement, ERP, accounting, marketing, etc.). It will help streamline plan creation and implementation by providing built-in analysis and reporting tools.

In addition, templates for a range of change control tasks, such as change requests, change approvals, scheduling, job role assignment, and budgeting/cost management will take some of the "grunt work" out of process development while improving accountability and accuracy.

A centralized, cloud-based solution will not only make it easier for your team to communicate and collaborate, but help underscore connections between changes and their associated value as the project advances.

Finally, don't forget to include detailed protocols for changes to the change management plan itself! Being able to address the unexpected swiftly and decisively will keep things on track and make sure everyone is still working toward the (updated) goals you've set.

Step Four: Execute Your Plan

Executing the plan will likely include three stages: pre-implementation, implementation, and post-implementation. At all three stages, it's crucial to secure or, if possible, increase support for the changes being managed. You can accomplish this through the use of team leaders/project cheerleaders, but don't be afraid to incentivize buy-in, either. Even modest rewards for active participation can generate enthusiasm and momentum that helps minimize resistance and smooths the way for a successful transition.

You'll most likely have different KPIs for each stage of the implementation; these metrics will help guide you as you move forward and make necessary adjustments to eliminate delays and resistance while ensuring the change management project meets its own goals while supporting the larger initiative being managed.

Step Five: Evaluate and Refine

As the project lifecycle enters the post-implementation phase, it's time for the project team to put its metrics to use, measuring the impact of the change, compliance before, during, and after roll out, and determine whether key messages were effectively absorbed by stakeholders.

This is when you'll set new baselines for success, and then begin a new change management plan to eliminate lingering resistance, improve compliance, and provide any necessary reinforcement through additional training and education.

For example, perhaps workflows modified to incorporate legacy software are no longer needed because the solution chosen provided an alternative solution, or internal restructuring eliminated the need for certain steps in a key process.

Whatever the case, it’s important to remember that the most effective change management plan is one flexible and robust enough to continue managing change and providing additional improvements to compliance and performance even after the initial changes being managed are “complete.”

Successful Organizational Change is Just a Plan Away

Change might be inevitable, but it doesn’t have to be painful. Take a proactive and collaborative approach. Prioritize communication, clarity, and engagement.

And most importantly, leverage the best available management tools and technologies to develop and implement a change management plan that balances organizational goals with human capabilities and expectations.

When you do, you’ll be ready to achieve lasting business transformation and help your organization adapt and thrive in today’s competitive and complex global market.

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