



Change Management Process Quick Reference Guide

CHANGE MANAGEMENT PROCESS

Quick Reference Guide

Description

This document provides a standard process to manage change for a project, program, or initiative. Project changes are required when there is a modification to scope, time, costs, or deliverables.

The purpose of the change management process is to manage the requests so that changes are approved and controlled. A formal change management process also allows initiatives to stay on schedule, within budget, and ensures that they follow the agreed upon scope.

Impacted Roles

All

Impacted Lines of Business

All

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Purpose

The primary objectives of change management are to:

- Manage each change request from initiation to closure.
- Process change requests that are vetted and approved.
- Communicate changes and any impacts to appropriate personnel.
- Allow minor changes to be managed with minimum expense.

Change Management Documents

The documents that follow are used to monitor and control change requests:

- **Change Request Form.** Used to identify and describe a proposed change.
- **Change Request Log.** Used to record all requests for changes so that they are tracked from initiation to closure.
- **Change Management Deliverables & Dates.** Abbreviated list of weekly priorities that must be completed.
- **Post-Implementation Review.** Checklist used to evaluate if the change request objectives were met.

Change Management Roles & Responsibilities

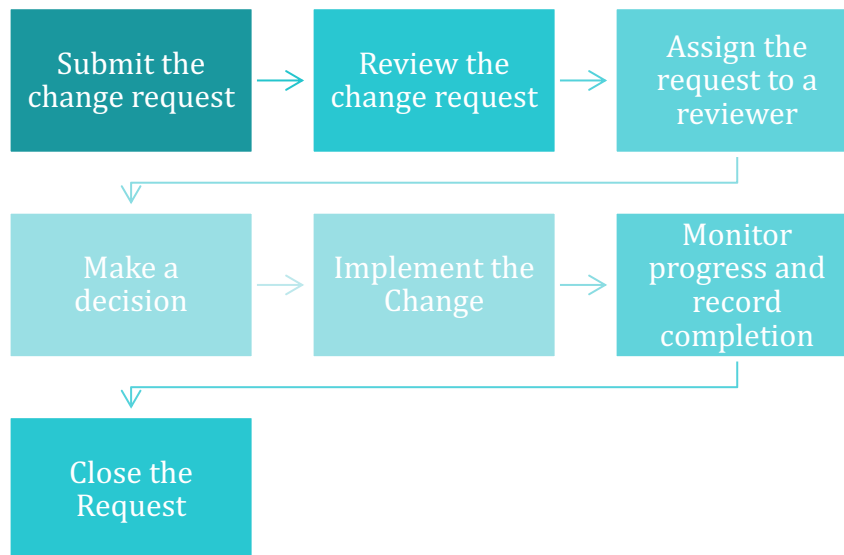
When a team member recognizes a need for a change to a project, program, or initiative, they should formally communicate the change to the project manager or appropriate leader. The project manager or leader receives, logs, monitors, and controls the progress of all changes.

Specific tasks include:

- Document the change requirements on the Change Request Form.
- Forward the change request and any supporting documentation to the appropriate leader or Steering Committee.
- Log and document all change requests in the Change Request Log.
- Escalate any requests to appropriate team members or leaders as needed.
- Communicate when changes are approved, rejected, or deferred to appropriate personnel.
- Ensure change request conflicts are resolved (i.e., two or more changes overlap).
- Close the change request and update the Change Request Log.

Change Request Policy

When changes are uncovered or requested that affect previously reviewed, approved, or published deliverables, they must be authorized by the project manager or designated leader.



1. **Submit the Change Request.** A formal request is made to make a change to a project/program/initiative. It includes a detailed description of the change and reason for it.
2. **Review the Change Request.** Review the request to determine if it is valid and assess the full impact of the change to the project timeline, scope, and budget. Also, determine if additional details are needed to properly assess the requested changes. Reasons for additional information include:
 - i. Number of changes and the scale of the proposed changes.
 - ii. Practicality and benefits if the changes are made.
 - iii. Complexity and level of difficulty to make the requested changes.
3. **Assign the Request to Reviewer.** Delegate a reviewer to assess the change requirements and recommend a course of action.
4. **Make a Decision.** The project manager or designated leader approves, rejects, or defers the change request.
5. **Implement the Change.** Once the approver consents, the changes are implemented, and impacted personnel are notified.
6. **Monitor.** Monitor progress and record completion status in the Change Request Log.
7. **Close.** Complete a post-implementation review and close the change request.

Change Request Form

Section 1: General Information			
This section includes basic information about the change request.			
Project/Program/Initiative		Change Number	
Date of Request		Requested By	
Priority	<input type="checkbox"/> Low	<input type="checkbox"/> Medium	<input type="checkbox"/> High
	<i>Minimal Business Impact</i>	<i>Time-Sensitive Issue</i>	<i>Critical Business Impact</i>
Assumptions/Notes			
Attachments/References	<input type="checkbox"/> Yes	<input type="checkbox"/> No	Link:
Section 2: Change Explanation			
This section provides a description of the change including the reason for making it.			
Description of Change <i>Describe the change that is being requested.</i>			
Reason for Change <i>Describe the reason for the change and alternatives that have been tried or considered.</i>			
Deliverables Impacted <i>Include a list of deliverables affected by the change request and the anticipated impacts to any work that is already completed.</i>			
Technical Impacts <i>Describe any technical changes required to implement the change.</i>			
Risks <i>Describe the risks that should be considered if the change is made or not made.</i>			

Section 3: New Deliverables

Describe the new deliverables, estimated hours to complete them, and impacts to other project deliverable dates.

New Deliverable	Estimated Hours	Dates of Completion	Impact to Other Dates

Section 4: Budget Impacts

This section describes the overall impact of the change to the budget.

Item Description	Hours		Dollars	
	Reduction	Increase	Reduction	Increase

Section 5: Decision

Indicate if the change is approved, rejected, or deferred. Explain the reason for the decision.

Decision	<input type="checkbox"/> Approved	<input type="checkbox"/> Approved with Modifications	<input type="checkbox"/> Rejected	<input type="checkbox"/> Deferred
Decision Date				
Reason for Decision				

Section 6: Comments

Include additional comments, if necessary.

Section 7: Signatures

The Change Request Approver confirms the changes by signing below.

Approver's Printed Name

Date

Title

Signature