Change management template

This change management template serves as a strategic guide to navigate the complexities of organizational transformation.

Whether you're implementing new technologies, revamping processes, or restructuring teams, successful change hinges on meticulous planning, communication, and tracking.

If you work with teams across different departments, use this template as a central document to help foster clarity, consistency, and collaboration throughout the change journey. By scrolling further down the page, you'll find another table with examples to help guide you.

But first, here are some prompts to help you get started

Item	Description	Responsibility	Start date	End date	Status	Comments/notes
Objective	Clear definition of the change of goal.	Who owns the objective?	When is this objective set to begin?	Expected completion date.	Not Started/ In Progress/ Completed	Any relevant notes or updates.
Stakeholders	List of individuals/groups affected.	Who's in charge of liaising?	Initial contact date.	Date of buy-in or approval.	Not Contacted/ Engaged /Approved	Feedback or concerns from stakeholders.
Communication	What needs to be communicated?	Who is responsible for communication?	Communication initiation date.	Next update or feedback session.	Not Started/ Ongoing /Completed	Any specific feedback or communication outcomes.

Training	What training is required?	Who will conduct the training?	Training start date.	Training completion date.	Not Started/ In Progress /Completed	Feedback on training sessions.
Resources	Resources needed for the change.	Who will provide or manage these?	Resource provision start date.	Expected date of all resources being available.	Not Started/ In Progress /Completed	Any issues or updates related to resources.
Risks & mitigations	Potential risks identified.	Who's responsible for addressing these risks?	Risk identification date.	Date by which mitigation is to be implemented.	Not Addressed/ In Progress /Mitigated	Notes on risk evolution or mitigation success.
KPI's & monitoring	Key Performance Indicators.	Who will measure and report?	KPI tracking start date.	Next evaluation date.	Not Started/ Ongoing /Achieved Feedback or results related to KPIs.	Feedback or results related to KPIs.

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Objective	Implement a new CRM to improve lead tracking and sales efficiency.	RevOps Manager	2023-01-15	2023-03-15	In Progress	Initial team briefing completed.
Stakeholders	Sales team, marketing team, IT department.	Change Management Lead	2023-01-10	2023-01-25	Engaged	Sales team expressed concerns about data migration.
Communication	Introduction to new CRM features, benefits, and transition timeline.	Communication Lead	2023-01-18	2023-02-05	Ongoing	Bi-weekly updates scheduled.
Training	Training sessions on using the new CRM system.	Training Lead	2023-02-10	2023-02-25	Not Started	Training modules being developed.
Resources	New CRM software licenses, training materials, IT support.	IT Manager	2023-01-15	2023-01-30	In Progress	75% of licenses purchased.
Risks & mitigations	Potential data loss during migration, resistance to change from staff.	Risk Analyst	2023-01-12	2023-02-15	Not Addressed	Plan to backup all data and hold a Q&A session for concerned staff.
KPI's & monitoring	Successful data migration, number of trained staff, increased lead tracking efficiency.	Data Analyst	2023-02-28	2023-03-15	Not Started	Baseline data collected.