Quick Start Guide

The Quick Start Guide serves two purposes.

- **For small to medium** changes, the guide provides a single document for gathering information and planning for the change. The Quick Start Guide is completed by the Project Manager and Business Sponsor.
- For **large to transformational** changes, the guide serves as an initial data gathering tool. It allows the change team to begin to gather information and act on change activities to be completed in the first 60 days of the program until the full Change Plan is defined. The Quick Start Guide is completed by the Change Lead with input from the Project Manager and Business Sponsor.

NOTE: Additional deliverables are noted as shown "(see Performance Gap Worksheet)."

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Mitigating resistance is the primary objective of Change Management. Resistance is any challenge, concern, question, misalignment, roadblock, or disagreement that has the potential to slow down, stop, or reduce the intended impacts of the change.

Strategize & Align

The **Strategize** stage typically occurs prior to the assignment of program/project resources. The decisions made during this stage need to be communicated and understood by all stakeholders.

Program/Project Name:	**Magnitude of Change (Small, Medium, Large, Transformational)**:
Start Date:	**End Date**:
Description:	
What is/are the strategic driver(s) for this change (see Performance Gap Worksheet)?	
What constitutes success (see Performance Agreement)?	
Do leaders agree on the description, drivers, and measures of success?	
When does the organization expect to see results?	
What documentation exists about the change?	
Has this information been communicated to all stakeholders in language they understand and in a way that defines how they will be impacted (see Performance Gap Presentation)?	

Resistance	Mitigation	Responsible	Due
<Strategic drivers for the change have not been defined>	<Define drivers in next leadership meeting (30 minutes)>	<OCM Lead and Exec Sponsor>	<1/31/2021>

Note: Sample entries for Resistance and Mitigation are shown in <BLUE.>

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Decide & Commit

In **Decide**, leaders agree on the programs and projects needed to meet strategic objectives. They set priorities and allocate resources (money and people) to complete this work. These decisions impact the change and how it is managed.

What are the current top five programs/projects for the organization (see Change Prioritization)?
What are the objectives for this project/program (see Project Objectives)?
Where does this project/program fit in terms of prioritization?
What is the magnitude of this change (see Change Magnitude Calculator)? Transformational, High, Medium, Low
Has an adequate budget been defined and approved for this project, including costs for Change Management, Communication, and Training (see Change Resourcing ROME)? Is there an appropriate "contingency" to account for unexpected challenges?
Who has ultimate accountability for the change?
Who has been tasked with leading the change (Executive Sponsor, Business Sponsor, Project Manager)?
Will this change fundamentally alter the way your organization operates, considering behaviors, beliefs, ways of working, written and unwritten rules? How (see Culture Analysis)?

Resistance	Mitigation	Responsible	Due
<Training has not been accounted for with budget or staffing>	<Meet with business sponsor to determine resourcing to be used for training and determine if a Change Request is needed.	<OCM Lead, Project Manager>	<1/31/2021>

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Plan & Engage Stakeholders
In **Plan,** requirements are defined, the solution is developed, stakeholders are engaged, and plans to implement the change are defined.

Have groups impacted by the change been identified (see Stakeholder Identification)? Complete table below.
How will issues be escalated (see Project Governance)?
How will decisions be made, documented, and communicated to Stakeholders?
Are all impacted groups included in governance including the issue escalation and decision-making process?
Are members of the project team and their managers aware of their role and project time commitments?
What is the business problem or performance challenge that the organization is trying to resolve?
Is this change a part of a larger change? If so, what is the larger change and what role does this change play?

Impacted Group	Leader	Project Team	Impact	Notes
<Finance>	<CFO>	<Finance Workstream Lead>	High	<Training will be challenging because this change is planned to launch during financial year-end>.

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Plan & Engage Stakeholders (continued)

In Plan, requirements are defined, the solution is developed, stakeholders are engaged, and plans to implement the change are defined.

Have major impacts to the organization been identified (see States of Change Worksheet)?   If yes, what are they (document below).
Have major impacts been communicated to impacted teams?
When and how will you seek feedback from stakeholders to gauge the readiness of the business for the change (see Business Readiness Assessment)?

Area	Current State	Future State	Notes
Tools and Technology	<5 financial systems by business unit>	<1 Financial System with consolidated reporting>	<This will require standardization of business processes.>
Business Process			
Human Capital			
Culture			
Measures and Motivators			
Accountability			

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Plan & Engage Stakeholders (continued)

In Plan, requirements are defined, the solution is developed, stakeholders are engaged, and plans to implement the change are defined.

Is there a high-level timeline for the project that can be shared?
Is the timeline to complete this project/program realistic?
Have key leadership activities been defined and shared (see Leadership Plan)? Document in table below.
Have key messages been developed and approved (see Communication Approach)?
Have key communication events been defined? Document in table below.
Have the learning needs of impacted groups been identified (see Learning Needs Analysis)?
Is there a plan to meet the minimum training requirements of impacted groups (see Education Approach)? Document in table below.
Is there a plan to monitor organizational performance during the transition from Current State to Future State and ensure that business performance is not at risk (see Performance Monitoring Plan)? Document in table below.
Will there be a single place where impacted stakeholders can access information about the change (see Change Headquarters Wireframe)?
Will the organizational structure, job descriptions, performance measures, and compensation need to change (see Organizational Structure Plan)?

Change Roadmap Element	Activity	Responsible	Due	Notes
Leadership Plan				
Communication Plan	<Roadshow to share information about the change	<Business Sponsor and Division Leaders>	<2/14/2021>	<Corporate communications will assist with creating communication collateral>

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Change Roadmap Element	Activity	Responsible	Due	Notes
	with the business>			
Training Plan				
Reinforcement				
Culture Plan				
Transition Plan				

Resistance	Mitigation	Responsible	Due
<Finance is concerned that training will be generic and not address how work is actually done.>	<Review findings from Learning Needs Analysis with Finance to confirm that topics identified in training are relevant and adequate>	<Business Sponsor>	<1/15/2021>

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Execute and Implement Solution

In **Execute,** the project team begins to implement and support the change. Transfer of ownership to the business begins. The Roadmap created during planning is implemented.

What support will be available to the organization during implementation of the change (see Deployment Plan)? Document in table below.
What activities need to be completed by the project team to prepare the organization to accept the change? Document in table below.
Does the business have a plan in place to take over ownership of the change (see Operational Plan)?   Document in table below.
How will you know that the change has been successful (see Adoption Plan)? Document in table below.
What tools will be used to assist with scheduling and delivery of training (see Training Logistics Plan)?

Roadmap Element	Activity	Responsible	Due	Notes
Deployment	<Define and communicate hours of support>	<Technical Lead>	<2/15/2021>	
Operational				
Adoption				

Resistance	Mitigation	Responsible	Due
<Drivers have not been defined>	<Define drivers in next leadership meeting (30 minutes)>	<OCM Lead and Exec Sponsor>	<1/31/2021>

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Operationalize & Engage Business

In **Operationalize,** the project team begins to implement and support the change. Transfer of ownership to the business begins. All Roadmap activities defined in Plan and Execute are completed.

Who from the business will determine when project team support is no longer needed?
Who from the business will monitor business performance during the change?
Who from the business will communicate to the project team if additional training, communication, or support is needed?
How long after implementation will it take to understand if project objectives have been met??
Who from the business will determine whether project objectives have been met?
Who in the business is responsible for taking over business process, policy and procedure, and training documentation?
If elements of the change still need to be addressed after the handoff to the business, who from the business will take responsibility for completing them?

Resistance	Mitigation	Responsible	Due
<Project team is concerned that the business gets to determine project success>	<In core team meeting, reinforce that the business is held accountable for meeting project and performance objectives. Review project objectives and align to project requirements>	<Business Sponsor>	<11/15/2020>

Evaluate

What documentation will be required to determine whether project objectives have been met (see Performance Gap Close Analysis)?
Who from the project team and the business will report back to leaders on the results of the change?
Which leaders need to be informed on the results of the change?

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Evaluate
What are the consequences of not achieving project objectives?

Resistance	Mitigation	Responsible	Due
<Need to define consequences for not achieving project objectives>	<Work with leaders to define consequences, then share with project team and business>	<OCM Lead and Exec Sponsor>	<1/31/2021>

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