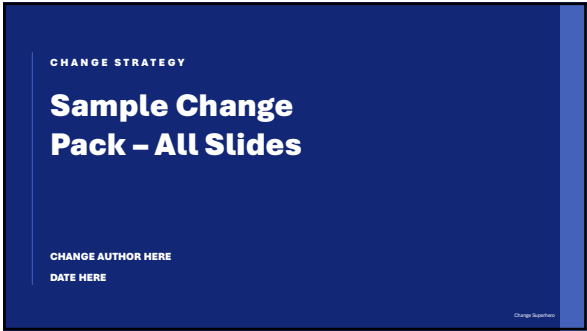
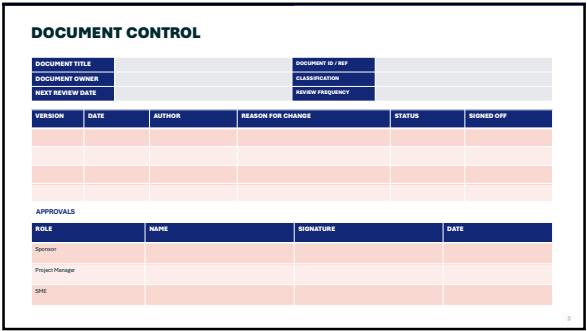




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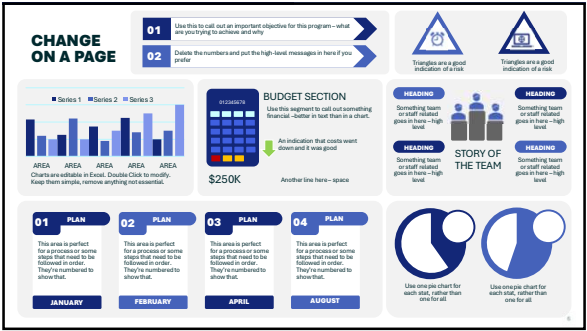
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4



5



6

CHANGE ON A PAGE
A short description of the Change in here. The same summary as the change canvas. This is a one-page overview that would be on the SharePoint, Inplace taking points, a Newsletter etc. It is important to get this right as it will be reused

CHANGE DRIVERS
Why is this change happening, is it a regulatory change? Explain why this change is happening and why it is happening now

WHO IS IMPACTED?
A high-level summary of who is impacted and the impact it will have on them. Eg The whole company, just a department?

ENGAGEMENT APPROACH
This is the same thing as the Change approach - Talk about who will manage the Training/Training and the model for leading the change and driving adoption

27 **136** **42%**

ADD a call out metric Add a call out metric Add a call out metric

CHANGE BENEFITS
List the benefits at a high level here.
List the benefits at a high level here.
List the benefits at a high level here.

SUCCESS METRICS
How will you know if you are successful. What will you use to measure the progress, adoption and completion

TRAINING
Add a summary of the training and comms here.

TIMELINE
A description of the activities or milestones.
A description of the activities or milestones.
A description of the activities or milestones.

7

CHANGE CANVAS

1 WHO IS MY CUSTOMER?
Be very specific. Create a persona and opportunity canvas for each type of customer, or group them into segments

2 WHAT IS THEIR PROBLEM?
What is the problem they have today?
• Why does this matter to them?
• What is the consequence of not changing?
• Is there a time challenge?

4 SOLUTION
List a product, feature or enhancement that will solve their problem - Create a canvas for each solution.

3 CURRENT SOLUTION
How do they address these problem today? What workarounds do they have? These are their pain points. You'll use them in messaging.

5 ADOPTION STRATEGY
What would they need to do to discover and adopt your strategy. How will they learn about it, how will they learn to do it.

6 WHAT DOES SUCCESS LOOK LIKE?
What specific metrics or behaviours would you use or be able to report on to realise the benefits of this change.
List any tangible business benefits here. Clearly define how this solution would solve the problem and its pain points? How does this benefit the business. What metrics will you have to prove this.

7 CHALLENGES/CHANGE DETRACTORS?
Who or what would hinder or object to this change? Why won't it work? What objections might you receive from end users, customers and stakeholders? Are they valid? How will you deal with them?

8

CHANGE ON A PAGE

65% Make sure it's really clear which bit of this pie chart is important. Give a percentage or use a bubble chart. Note about this part here

80% 80% of letter people are always good to show for stats involving people

50% **80%**
COHORT COHORT
Note about a segment of your audience, could be gender or role. Note about a segment of your audience, could be gender or role.

GEOGRAPHICAL RELEASE
Note about a milestone or deliverable. Note about a milestone or deliverable. Note about a milestone or deliverable.

TIMELINE
Note about a milestone or deliverable. Note about a milestone or deliverable. Note about a milestone or deliverable. Note about a milestone or deliverable.

\$250K Sometimes a big number is all you need to show.

8 DAYS Sometimes a big number is all you need to show.

19 JULY GO LIVE Start/End date or countdown timer goes in here

9

CHANGE ON A PAGE

1 Note about a milestone or deliverable at an important sequential step in the journey

2 Note about a milestone or deliverable at an important sequential step in the journey

3 Note about a milestone or deliverable at an important sequential step in the journey

IN A RECENT SURVEY
4/5 80% of letter people are always good to show for stats involving people. The number of people is not important if you are showing a percentage

PROCESS STEPS
1 2 3 4
5 6 7 8
ACTIVITY ACTIVITY ACTIVITY ACTIVITY
ACTIVITY ACTIVITY ACTIVITY ACTIVITY

\$250K When the chart is not very self explanatory please call out what you want them to see

63% This could be a quote or a concern related to a percentage. It is probably important to get the big focus

24% This could be a quote or a concern related to a percentage. It is probably important to get the big focus

AREA AREA AREA AREA AREA

10

CHANGE CANVAS

Initiative name Initiative name Change Manager CM Name
Project Sponsor Sponsor Name Project Manager PM Name
Go Live Date Date

DESCRIPTION
Describe the change in a concise way that can be easily communicated to an audience outside your project. Think about how this might appear in the newsletter. Include Why this change is happening. Ideally reference corporate values and pillars.

BENEFITS
• List the main Benefits -
• This would be a bulleted list
• Include strategic alignment
• Repeat for as bullets with the capacity for some to go to multi lines
• Repeat would be single lines
Two lines here - 0, 0 space and 6 pts after.

APPROACH
In this box you add a description of how you'll deliver the change. You may mention a phased approach and refer to how you'll communicate or train. I would include the team members here. You could add the governance here

VISION/TARGET STATE
Here focus on the output, what is the 'to be' what will it look like when this change is complete? What will users do differently. Include any org-wide and dependencies here.

STAKEHOLDER IMPACTS
You'll list the impacted stakeholders here by group and say the severity of the impact. This could be text, or it could be a list
Customer Contact Centre - High
Office of the CEO - Med.

TRAINING
Trainings approach would go in here.

SUCCESS METRICS
How will we know if we are successful? Here you might talk about training completion, baseline surveys, adoption metrics.

TRAINING IN HERE
Trainings approach would go in here.

RISKS
Add any risks and mitigations in here. What could go wrong

11

THE CASE FOR CHANGE
WHY THIS CHANGE IS HAPPENING | WHY IT'S HAPPENING NOW

Use this box to give a high-level description of the change. Our Finance and supply systems are no longer able to support current regulatory requirements.

CURRENT STATE
• In a few bullet points describe where you are now. What do you have?
• What does not work and why doesn't it work. Consider the audience when you think about the detail.
• Where possible quote dollar values or FTE impact. People like to know how much this is costing them now so they can measure the change benefits.

WHY NOW?
• In a few bullet points describe where you are now. What do you have?
• What does not work and why doesn't it work. Consider the audience when you think about the detail.

BENEFITS
What is a benefit of this change - you will normally find these in the business case or scope document.
What is a benefit of this change - you will normally find these in the business case or scope document.
What is a benefit of this change - you will normally find these in the business case or scope document.

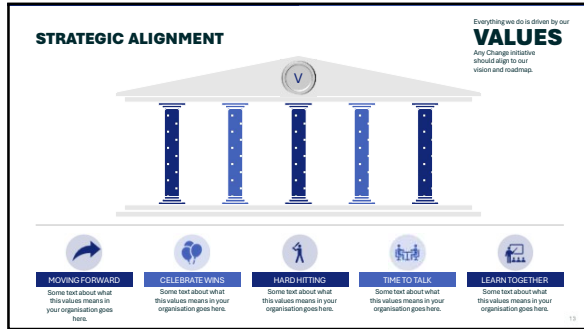
WHAT CHANGES?
What is a benefit of this change - you will normally find these in the business case or scope document.
What is a benefit of this change - you will normally find these in the business case or scope document.
What is a benefit of this change - you will normally find these in the business case or scope document.

Notes: Or what happens if we don't change. The cost of doing nothing.
1. The product will no longer be supported.
2. The software is open to cyber security threats?

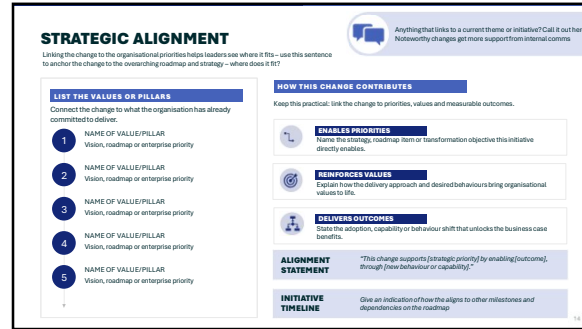
The ask - or the current state of this change project application

Project Initiation Team assembled Planned Pilot Start Delivery

12



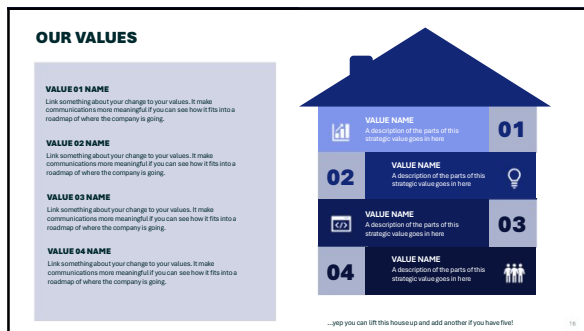
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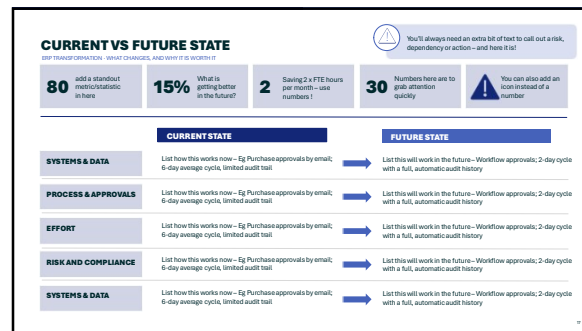
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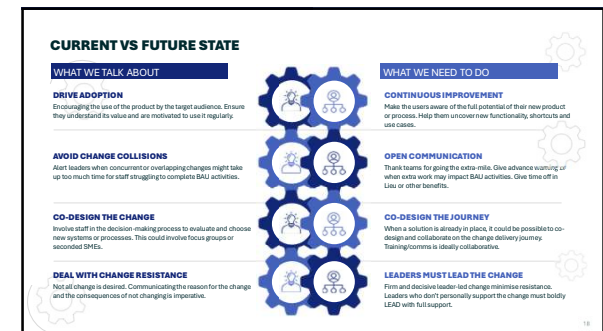
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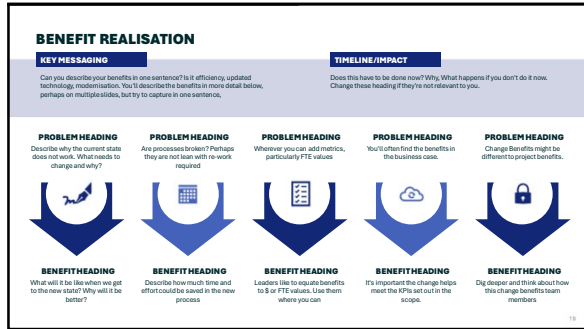
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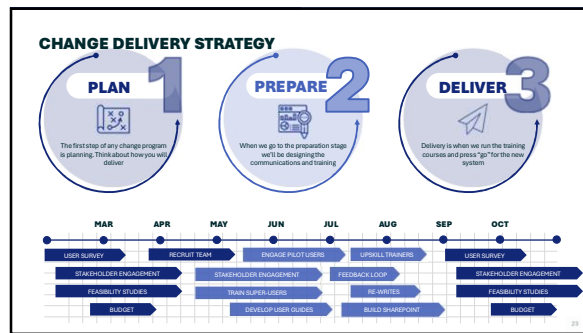
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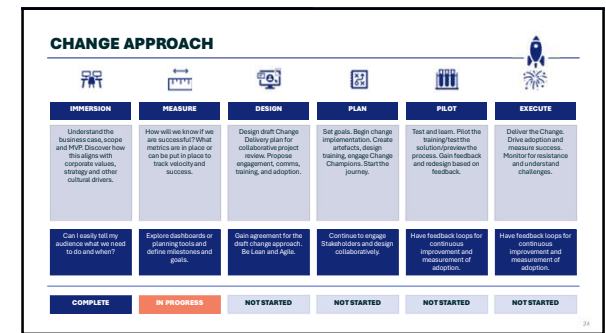
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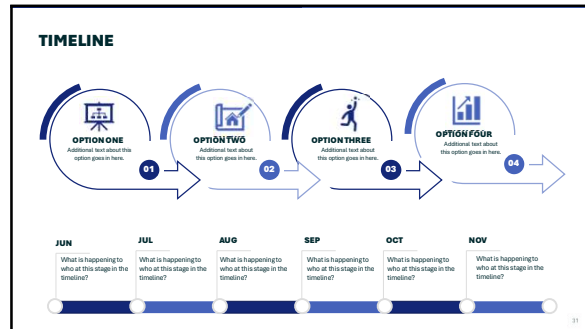
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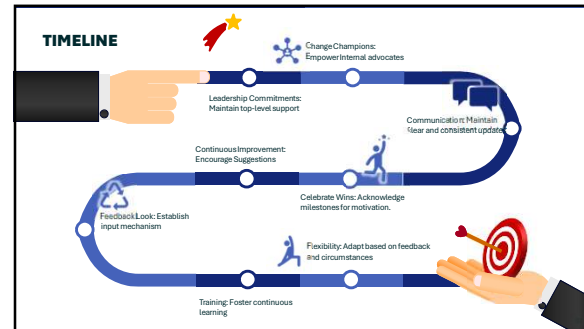
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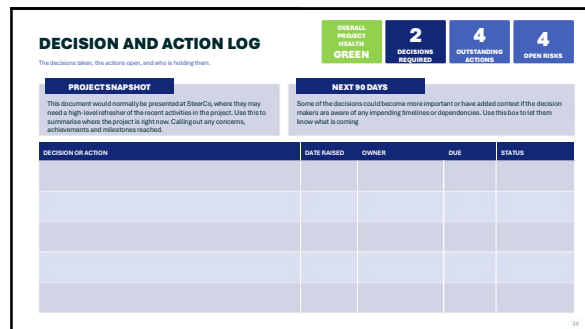
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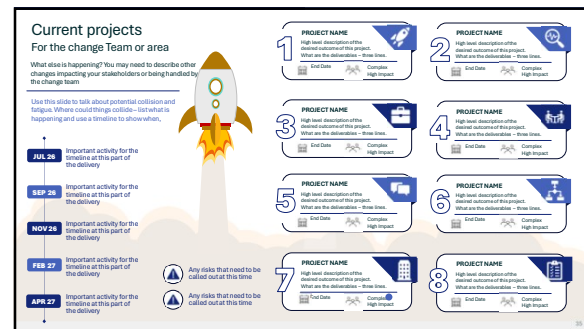
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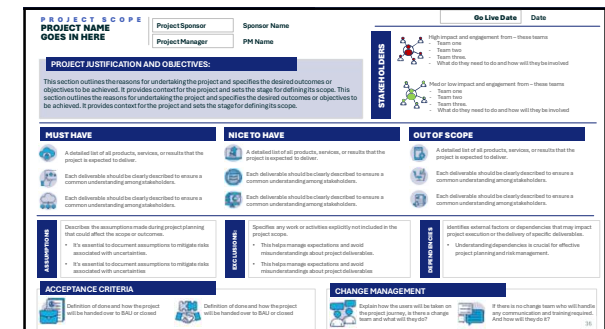
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34



35



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MEET THE TEAM



Amara Okafor
PROJECT LEAD



David Mercer
CHANGE LEAD



Mei Tanaka
TRAINING LEAD



Liam Docherty
COMMS LEAD



Sofia Alvarez
SPONSOR



Rahul Iyer
DATA & REPORTING



Margaret Hale
STAKEHOLDERS



Tara Faleolo
TECHNICAL LEAD

37

MEET THE TEAM

LEADERSHIP TEAM



Amara Okafor
SENIOR PROJECT MGR



David Mercer
PROGRAM MANAGER



Margaret Hale
CHANGE DIRECTOR



Sofia Alvarez
SPONSOR



Mei Tanaka
TRAINING LEAD



Liam Docherty
COMMS LEAD



Rahul Iyer
DATA & REPORTING



Tara Faleolo
TECHNICAL LEAD



Claire Beaumont
BUSINESS ANALYST



Marcus Ellis
DEPLOYMENT LEAD



Yasmin Haddad
TRAINING COORD.



Kerri Watson
SOLUTION ARCHITECT



Naomi Clarke
CHANGE ANALYST



Jarrah Williams
ENGAGEMENT LEAD



Declan Byrne
TESTING LEAD



Anita Deshpande
BENEFITS LEAD

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CHANGE MANAGEMENT RESPONSIBILITIES

Structure and responsibilities vary greatly between organisations. A Change Analyst could be positioned as a peer to a Change Manager, undertaking a more data driven role, however they are normally seen as more junior than a Change Manager.



CHANGE ANALYST	CHANGE MANAGER	CHANGE LEADER	CHANGE DIRECTOR
- Takes direction from a Change Leader - Performs administrative duties supporting change. - Takes to stakeholders and gathers information. - Contributes to strategy but is not responsible for overall roadmap.	- Uses an existing framework to implement change, taking direction from program manager or Change leader. - Works autonomously, knows what is required and is accountable for delivering change outcomes.	- Responsible for Change delivery framework and roadmap. - Plans Change delivery framework and strategy. - Works alongside PM. May have Change Analyst reports. - Is measured against business scope and must provide success metrics.	- Responsible for a Change Team on a larger project or Manages multiple projects. - May be responsible for setting up Change Frameworks and community of practice. - Reports directly to the Program Manager/Sponsor.

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SECTION

03

PEOPLE & IMPACTS

40

STAKEHOLDER REGISTER									
NAME	AREA	#	IMPACT	NOTES	RELATIONSHIP OWNER	STAKEHOLDER NAME	RELATIONSHIP OWNER	STAKEHOLDER NAME	RELATIONSHIP OWNER
Stakeholder Name	Area, Bus Unit, location	245	MED	How their work, systems, or team actually change	RAG	1	CHAMP	Change Champion Name	
Stakeholder Name	Area, Bus Unit, location	82	MED	How their work, systems, or team actually change	RAG	1	CHAMP	Change Champion Name	
Stakeholder Name	Area, Bus Unit, location	245	MED	How their work, systems, or team actually change	RAG	1	CHAMP	Change Champion Name	
Stakeholder Name	Area, Bus Unit, location	245	MED	How their work, systems, or team actually change	RAG	1	CHAMP	Change Champion Name	
Stakeholder Name	Area, Bus Unit, location	245	MED	How their work, systems, or team actually change	RAG	1	CHAMP	Change Champion Name	
Stakeholder Name	Area, Bus Unit, location	245	MED	How their work, systems, or team actually change	RAG	1	CHAMP	Change Champion Name	
Stakeholder Name	Area, Bus Unit, location	245	MED	How their work, systems, or team actually change	RAG	1	CHAMP	Change Champion Name	
Stakeholder Name	Area, Bus Unit, location	245	MED	How their work, systems, or team actually change	RAG	1	CHAMP	Change Champion Name	
Stakeholder Name	Area, Bus Unit, location	245	MED	How their work, systems, or team actually change	RAG	1	CHAMP	Change Champion Name	

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STAKEHOLDER REGISTER									
NAME	AREA	#	IMPACT	DETAILS	COMM CHANNLS	CADENCE	OWNER	CONTACT DATE	NEXT ACTION
Stakeholder Name	Business Area or location	245	LOW	How this change impacts this group—role, resistance, comms and training.	Email, town hall, bulletin, change champions	Weekly	SME, Relationship Manager	12/9/25	Confirm champion nominations and set the next catch-up.
Stakeholder Name	Business Area or location	245	MED	How this change impacts this group—role, resistance, comms and training.	Email, town hall, bulletin, change champions	Weekly	SME, Relationship Manager	12/9/25	Confirm champion nominations and set the next catch-up.
Stakeholder Name	Business Area or location	245	MED	How this change impacts this group—role, resistance, comms and training.	Email, town hall, bulletin, change champions	Weekly	SME, Relationship Manager	12/9/25	Confirm champion nominations and set the next catch-up.
Stakeholder Name	Business Area or location	245	MED	How this change impacts this group—role, resistance, comms and training.	Email, town hall, bulletin, change champions	Weekly	SME, Relationship Manager	12/9/25	Confirm champion nominations and set the next catch-up.
Stakeholder Name	Business Area or location	245	MED	How this change impacts this group—role, resistance, comms and training.	Email, town hall, bulletin, change champions	Weekly	SME, Relationship Manager	12/9/25	Confirm champion nominations and set the next catch-up.
Stakeholder Name	Business Area or location	245	MED	How this change impacts this group—role, resistance, comms and training.	Email, town hall, bulletin, change champions	Weekly	SME, Relationship Manager	12/9/25	Confirm champion nominations and set the next catch-up.
Stakeholder Name	Business Area or location	245	MED	How this change impacts this group—role, resistance, comms and training.	Email, town hall, bulletin, change champions	Weekly	SME, Relationship Manager	12/9/25	Confirm champion nominations and set the next catch-up.
Stakeholder Name	Business Area or location	245	MED	How this change impacts this group—role, resistance, comms and training.	Email, town hall, bulletin, change champions	Weekly	SME, Relationship Manager	12/9/25	Confirm champion nominations and set the next catch-up.
Stakeholder Name	Business Area or location	245	MED	How this change impacts this group—role, resistance, comms and training.	Email, town hall, bulletin, change champions	Weekly	SME, Relationship Manager	12/9/25	Confirm champion nominations and set the next catch-up.

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CHANGE IMPACT ASSESSMENT											
AREA	Contact	No. of people	Overall impact	Process impact	Technology impact	Resource impact	Performance	Support	Time	Efficiency	Value
AREA NAME	Contact Name	245	LOW	LOW	LOW	HIGH	LOW	HIGH			HIGH
AREA NAME	Contact Name	245	MED	MED	MED	LOW	MED	LOW			LOW
AREA NAME	Contact Name	245	MED	MED	MED	MED	HIGH	MED			MED
AREA NAME	Contact Name	245	HIGH	HIGH	HIGH	MED	MED	LOW			HIGH
AREA NAME	Contact Name	245	MED	MED	MED	HIGH	HIGH	HIGH			HIGH
AREA NAME	Contact Name	245	MED	MED	MED	HIGH	HIGH	LOW			HIGH

Note: This is often better achieved in Excel as you can use conditional formatting and calculate overall impact automatically

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IMPACT ASSESSMENT

IMPACT

MEDIUM

NAME

AREA

Contact Name

Area Name

Meeting Date

Next Action Date

Date

Date

DESCRIBE THIS IMPACTED AREA

What do these guys do? What is their role in the organisation. How do they work with other areas. Aim to get an understanding of the people who work here who may be impacted by your change.

TEAM SUPPORT

Who is your point of contact for this team? Are there potential Change Champions or super users? Do coming get cascaded through the EA. Understand who to talk to, how and how often.

CHANGE APPETITE

How have previous changes worked for this team? Did they get frustrated with, Will this team embrace change or will they find it difficult? Need to understand about any members of the team that might need additional help changing.

CAPACITY FOR CHANGE

What other changes are going on here? Will there be competing priorities with other changes or business initiatives? Is the team fully staffed? Holidays, sickness, back-out periods? If you're going to ask them to do something they'll need to stop doing something else. Understand how difficult this will be if you want them to do training.

PREFERENCES

How does this team like to receive communication. Are there regular stand-ups or huddles? Do they communicate via email or Teams? What is their preference? Are they normally responsive and quick to change or not in their ways. Try to find out if your change can fit in with regular cadence of meetings and communications channels.

WHAT CHANGES

- You might need to find this out in more detail and complete it later – or send a BA but we need to find out what the team will need to do differently.
- Do they need training or work instructions updated? Who will ensure they have done the training. Can they all learn time away from their desks to complete the training?
- Will they need to change any current processes?
- Will anything they do right now be broken by your change?
- Who will help them if they get stuck with your change?

RISKS AND RESISTANCE

What doesn't work for this team? As the change manager and sponsor, you need to listen to them and seek to understand what might not work and take this back to the project. Why won't this work? What is the impact – what happened if we don't resolve this?

NEXT STEPS

What will you do next for this team?

Who will you talk to next on this team?

50

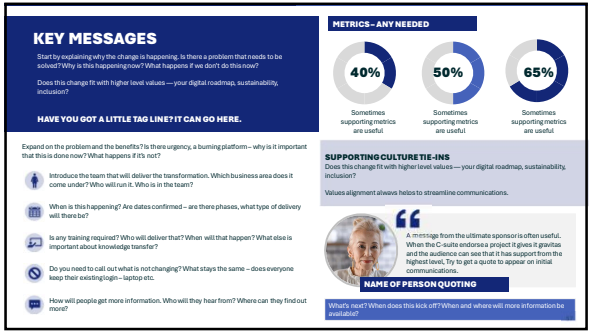




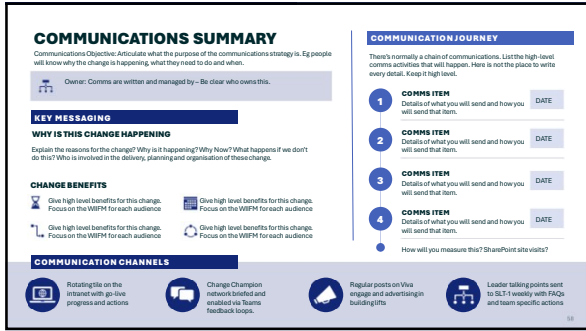
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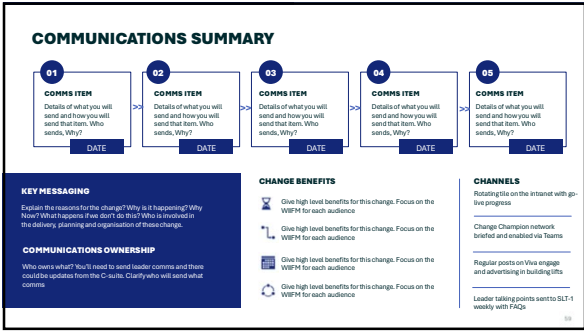
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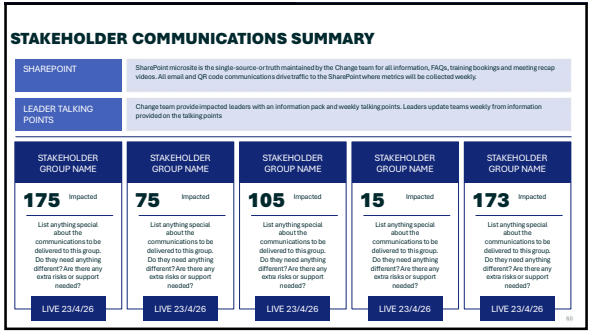
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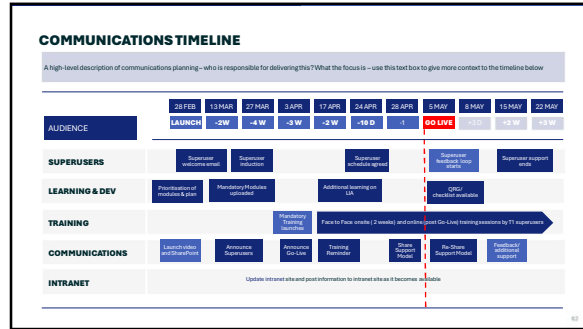
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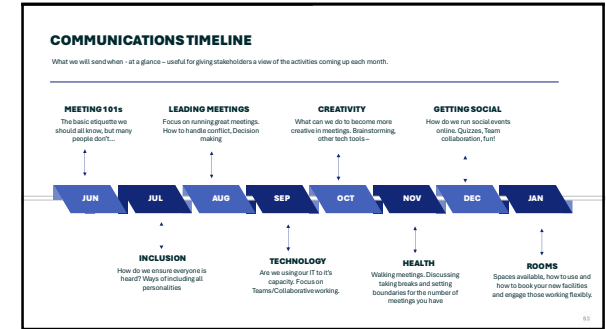
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COMMUNICATIONS TRACKER								
DATE	-8 Weeks	-7 Weeks	-6 Weeks	-5 Weeks	-4 Weeks	-3 Weeks	-2 Weeks	-1 Weeks
	DATE	DATE	DATE	DATE	DATE	DATE	DATE	DATE
OBJECTIVE	Enter the objective of this communication here	Enter the objective of this communication here	Enter the objective of this communication here	Enter the objective of this communication here	Enter the objective of this communication here	Enter the objective of this communication here	Enter the objective of this communication here	Enter the objective of this communication here
MESSAGE	Give an overview of what this communication will say and do. Background/benefits/ actions	Give an overview of what this communication will say and do. Background/benefits/ actions	Give an overview of what this communication will say and do. Background/benefits/ actions	Give an overview of what this communication will say and do. Background/benefits/ actions	Give an overview of what this communication will say and do. Background/benefits/ actions	Give an overview of what this communication will say and do. Background/benefits/ actions	Give an overview of what this communication will say and do. Background/benefits/ actions	Give an overview of what this communication will say and do. Background/benefits/ actions
AUDIENCE	Who is the intended audience for this piece?	Who is the intended audience for this piece?	Who is the intended audience for this piece?	Who is the intended audience for this piece?	Who is the intended audience for this piece?	Who is the intended audience for this piece?	Who is the intended audience for this piece?	Who is the intended audience for this piece?
STATUS	What is the current status of this task?	What is the current status of this task?	What is the current status of this task?	What is the current status of this task?	What is the current status of this task?	What is the current status of this task?	What is the current status of this task?	What is the current status of this task?

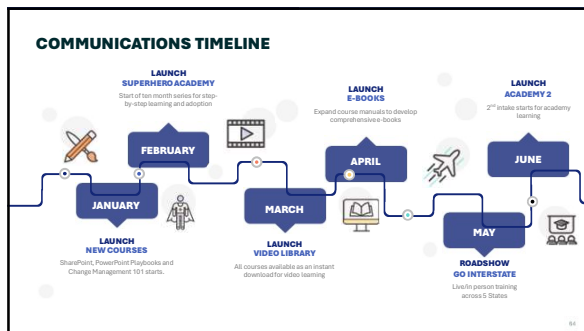
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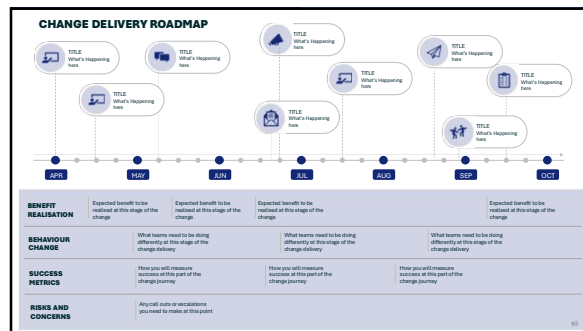
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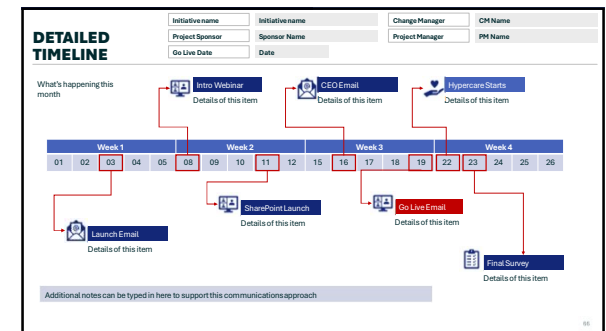
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66

IMPORTANT DATES

Add a paragraph to remind the audience what this change is about. It may be a while since they have had any communication about it.

REMINDE THEM WHAT THE BENEFITS ARE FOR THEM, WHY IS THIS CHANGING – WHAT WILL THEY DO DIFFERENTLY?

- Remind them what they need to do and why they need to do it. Follow up actions, dates and how to get help.
- Remind them what they need to do and why they need to do it. Follow up actions, dates and how to get help.
- Remind them what they need to do and why they need to do it. Follow up actions, dates and how to get help.
- Remind them what they need to do and why they need to do it. Follow up actions, dates and how to get help.

COMMS TITLE

01	02	03
JAN	FEB	MAR
ANNOUNCEMENT HEADING Additional details about what is happening on this date. Any actions, does this relate to a specific audience segment. Where do they get help?	ANNOUNCEMENT HEADING Additional details about what is happening on this date. Any actions, does this relate to a specific audience segment. Where do they get help?	ANNOUNCEMENT HEADING Additional details about what is happening on this date. Any actions, does this relate to a specific audience segment. Where do they get help?

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LEADER TALKING POINTS

NAME OF CHANGE PROJECT

JANUARY INFO AND ACTIONS

What you need to know about <change> already one-page for leaders to share with their teams

WHEN?
From Monday 21st March 2021

- You'll need to access System X via a new URL located on the desktop app.
- The first time you log on you'll be prompted to set up a new password.
- You'll need to reboot your machine.
- It will take around 15 minutes from start to finish.
- Some Reporting functionality will be restricted for the first 3 weeks.
- Performance may be slower than anticipated for the first few days.
- You'll need to re-set your profile, including uploading your photograph.
- All shared drive files will still be accessible.

NEED TRAINING?
A lunch and learn session is taking place on Friday 19th in the 2nd Floor conference room

PREFER SELF-PACED?
Check for any video instructions are available on the home page of the intranet site

CLOUD BASED
Access from anywhere without a VPN

MULTI DEVICE
Check for updates on all your devices. Use your phone or tablet.

NO STOP OUT OFF
24 Hour access available

SECURE
Multi-factor authentication keeps you & the safe

NEED SUPPORT?
Full support will be available for the first two weeks. Tap out for the red T-shirts. Working from home? please call the support desk.

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LEADER TALKING POINTS

NAME OF CHANGE PROJECT

Leader talking points can be provided by the change team to help the leader communicate the latest updates for the change. It's a new change, or the team have not had an update recently it's always useful to re-state the benefits. People will always focus on WIFIT. Help the leader to articulate this.

BENEFIT REMINDER
Why are we doing this? What was the problem that was being solved. Why are we solving it this way? Why is that good for this audience.

BENEFIT REMINDER
Why are we doing this? What was the problem that was being solved. Why are we solving it this way? Why is that good for this audience.

DATES TO NOTE
Let people know in advance if they have any actions and then they will need to do them

Supporting your **TEAM**

The change team want to make it easy for you to keep your team updated throughout changes – use this handy one page to keep them informed. Delete this textbox and put your own message in here.

- REASSURE PROGRESS**
Give a concise update. What was achieved since you last updated the team? Highlight any important dates.
- NEXT STEPS**
What is coming next – any actions for the team – what will they see and hear?
- TRAINING REQUIREMENTS?**
Anyone need to do any online learning? Webinars. How do they sign up, are those mandatory?
- GETTING INVOLVED**
Is there an opportunity for anyone to get involved? Are there change champions or superusers coming to the area.
- ACTIONS**
Be clear what people need to do

69

SURVEY RESULTS

221

How many respondents were there? Any response, mention 110 from X, 220 from Y.

What were you surveying them about?

Item one that we were asking them to comment on.

85% level of satisfaction with a brand

Over 175 respondents expressed satisfaction with X and reported they agree with Y.

Top level observation about the satisfaction of the product or service.

We surveyed our audience and report on the

What made the audience jump for joy. Continue high and very high scores for items impact on a small sample

DELIGHT factor

64% 44% 77% 68% 62%

1 2 3 4 5

Found the content good or very engaging

Enter the summary of the question answered.

Enter the summary of the question answered.

Enter the summary of the question answered.

Enter the summary of the question answered.

Enter the summary of the question answered.

PARTICIPANT COMMENTS

Customer comment goes in here

Customer comment goes in here

Customer comment goes in here

Customer comment goes in here

Customer comment goes in here

Customer comment goes in here

RECOMMENDATIONS

Any high level recommendations or insights at this stage?

Any high level recommendations or insights at this stage? Where can they find the full report or additional findings?

70

COMMUNICATIONS SUCCESS METRICS

SharePoint microsite is the single source-of truth maintained by the Change team for all information, FAQs, training bookings and meeting recap videos. All email and QR code communications drive traffic to the SharePoint where metrics will be collected weekly.

APPROACH SUMMARY

BLOGS | QUERIES | CUSTOMISATION

WEEK 1 WEEK 2 WEEK 3 WEEK 4

Tracked service desk calls

VISITS TO THE SHAREPOINT SITE

2045

40%

FAQ PAGE

156

40%

WEBINAR REPLAY

78

50%

QR CODE DOWNLOAD

923

70%

QUESTION THEMES

60%

HOW-TO Qs

Shift in questions from "what is happening?" to "how do I do that?" via champions and FAQs.

ACTION COMPLETION

80%

COMPLETION

Training recommendations, data cleaning tasks and LAR sign-ups – common works when people act.

POST GO-LIVE PROXY

85%

ADOPTION

Support tickets per user, "I don't know" ticket types, and login/adoption rates after launch.

71

SECTION 05 TRAINING

72

Initiative name
Project Name
Go Live Date

Subinitiative name
Spine/Name
Date

Change Manager
Project Manager
PM Name

CR Number

LEARNING PATHWAYS

Describe the learning journey or communication pathway for your project or use each column for a different cohort.

PHASE ONE	PHASE TWO	PHASE THREE	PHASE FOUR	PHASE FIVE
OBJECTIVE What would the learning objective be for this phase or month? What is your aim/goal?	EXAMPLE At the end of June all team members must have completed three compulsory online modules.	HEADING The quick brown fox jumps over the lazy dog. The quick brown fox jumps over the lazy dog. The quick brown fox jumps over the lazy dog.	HEADING The quick brown fox jumps over the lazy dog. The quick brown fox jumps over the lazy dog. The quick brown fox jumps over the lazy dog.	HEADING The quick brown fox jumps over the lazy dog. The quick brown fox jumps over the lazy dog. The quick brown fox jumps over the lazy dog.
OUTCOME What would the learning outcome be for this phase or month? What is the desired outcome?	EXAMPLE On completion they will be able to access the system and know the importance of cybersecurity to keep our customer data safe.	HEADING The quick brown fox jumps over the lazy dog. The quick brown fox jumps over the lazy dog. The quick brown fox jumps over the lazy dog.	HEADING The quick brown fox jumps over the lazy dog. The quick brown fox jumps over the lazy dog. The quick brown fox jumps over the lazy dog.	HEADING The quick brown fox jumps over the lazy dog. The quick brown fox jumps over the lazy dog. The quick brown fox jumps over the lazy dog.
MAY	JUN	JUL	AUG	SEP

79

LEARNING JOURNEY

If employees need to complete multiple modules this is useful

STEP 01
A bit of text about this step goes in here

STEP 02
A bit of text about this step goes in here

STEP 03
A bit of text about this step goes in here

STEP 04
A bit of text about this step goes in here

STEP 05
A bit of text about this step goes in here

STEP 06
A bit of text about this step goes in here

JAN
Add activities for the timeline here

FEB
Add activities for the timeline here

MAR
Add activities for the timeline here

APR
Add activities for the timeline here

MAY
Add activities for the timeline here

JUN
Add activities for the timeline here

JULY
Add activities for the timeline here

80

USER GROUP

USER GROUP

USER GROUP

USER GROUP

USER GROUP

LEARNING JOURNEY

IMPACTED USERS	125	145	500	04	12
PROCESSES CHANGED	12	09	12	09	10
MODULES REQUIRED	12	04	02	03	01
DETAIL	What this means for this group—what changes, and how often.	What this means for this group—what changes, and how often.	What this means for this group—what changes, and how often.	What this means for this group—what changes, and how often.	What this means for this group—what changes, and how often.
APPROACH	What training is recommended—webinar, instructor led, video, coaching.	What training is recommended—webinar, instructor led, video, coaching.	What training is recommended—webinar, instructor led, video, coaching.	What training is recommended—webinar, instructor led, video, coaching.	What training is recommended—webinar, instructor led, video, coaching.

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TRAINING NEEDS ANALYSIS SUMMARY

433
TOTAL IMPACTED

192
DEEP / ROLE-BASED

241
BASIC TRAINING

12
INDICATIVE COURSES

FINANCE	PROCUREMENT	SUPPLY CHAIN	WAREHOUSE	MANUFACTURING
DEEP ERP TRAINING 4 super users, 3 system admins. Full end-to-end training on GL, AP/AR and month-end close, plus reporting.	ROLE-BASED TRAINING 3 super users, 1 admin. Regulation/ITC supplier master and approvals, others role-based only.	ROLE-BASED TRAINING 2 super users. Planning, demand and inventory modules; rest need basic navigation and reporting.	BASIC + SCANNER 2 super users. Majority need basic goods receipt, pick/put and handheld scanner training.	BASIC TRAINING 4 super users across shifts. Operators need basic work order confirmation and time booking.
120	48	32	27	64

HR & PAYROLL	SALES & SERVICE	IT	LEADERSHIP	CONTRACTORS
DEEP ERP TRAINING 2 super users, 2 admins. Employee master, payroll run and self-service support for the workforce.	ROLE-BASED TRAINING 3 super users. Orders to cash, pricing and service tickets; field team need mobile app basics.	ADMIN TRAINING 6 system admins. Security roles, integrations and incident support; technical deep dive pre go-live.	DASHBOARDS ONLY No super users. Short session on dashboards, reports and where to get help.	BASIC TRAINING 1 super user. Basic accounts, timesheets and safety compliance accounts only.
38	18	95	12	22

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TRAINING NEEDS ANALYSIS

PERSON/ROLE	NO. OF PEOPLE	IMPACTED BY CHG	DEEPLY IMPACTED	MODERATELY IMPACTED	MINORLY IMPACTED	CHANGED BY CHG	SUPPORT	HOW	WHEN
NAME	1	Y	Y	N	Y	N			3
NAME	2423	Y	Y	Y	N	Y			4
NAME	345	Y	Y	Y	N	Y			4
NAME	245	Y	Y	Y	N	Y			3
NAME	245	Y	Y	N	Y	N			3
NAME	245	Y	Y	N	Y	N			3

Note: This is often better achieved in Excel as you can use conditional formatting and calculate overall training needs automatically

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IMPACT

NAME

Contact Name

Meeting Date

Date

MEDIUM

AREA

Area Name

Next Action Date

Date

TRAINING NEEDS ANALYSIS

DESCRIBE THIS IMPACTED AREA

What do these guys do? What is their role in the organisation. How do they work with other areas. Aim to get an understanding of the people who work here who may be impacted by your change.

TEAM SUPPORT

What is your point of contact for this team? Are there potential Change Champions or super users? How do this team like to do training. What has worked for them before

CHANGE APPETITE

How have previous changes worked for this team? Did they get hindered well. Will this team embrace change or will they find it difficult. Seek to understand about any members of the team that might need additional help completing the learning to adopt the change

CAPACITY FOR LEARNING

What other changes are going on here? Will there be competing priorities with other changes in business initiatives? Is the team fully staffed? Holidays, sickness, blank out periods? If you're going to ask them to do something they'll need to stop doing something else. Understand how difficult this will be if you want them to do training.

PREFERENCES

How does this team like to get training? Some teams prefer self-paced others like to do group training. Is there something in place already—regular training day or time when they go back down for training? Find out if you can fit into something they already do.

LEARNING MODULES

What learning modules and preferences for this team here?

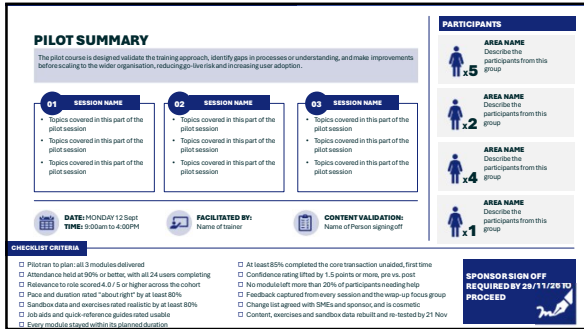
RISKS AND RESISTANCE

What type of training won't work for this team? As the change manager and liaison, you need to listen to them and seek to understand what might not work and take this back to the project. You are asking them to do online learning and they don't have a laptop? How will this work?

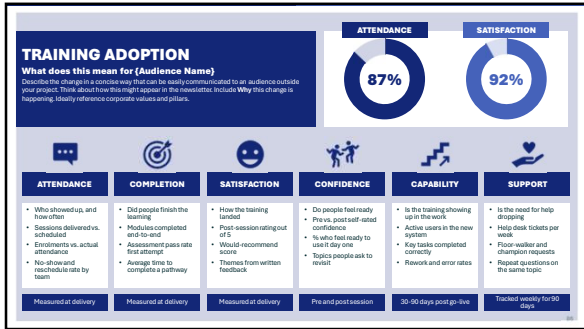
NEXT STEPS

What will you do next for this team? Who will you talk to next on this team?

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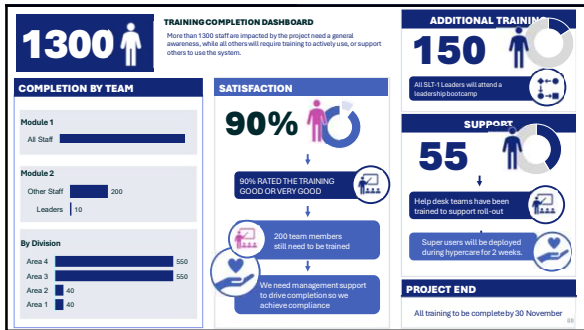


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TRAINING COMPLETION

PARTICIPANT NAME	MODULE 1	MODULE 2	MODULE 3	MODULE 4	MODULE 5	MODULE 6	MODULE 7	MODULE 8
Participant Name in here		✓						
Participant Name in here	✓		✓	✓		✓		
Participant Name in here	✓	✓	✓	✓		✓		
Participant Name in here	✓	✓	✓	✓		✓		
Participant Name in here	✓	✓	✓	✓		✓		
Participant Name in here	✓	✓	✓					
Participant Name in here								
Participant Name in here						✓		
Participant Name in here						✓		
Participant Name in here						✓		
Participant Name in here						✓		
Participant Name in here							✓	✓

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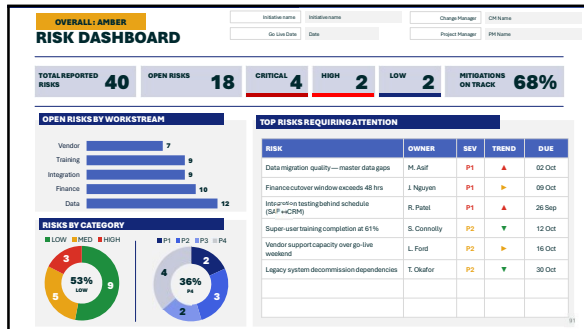


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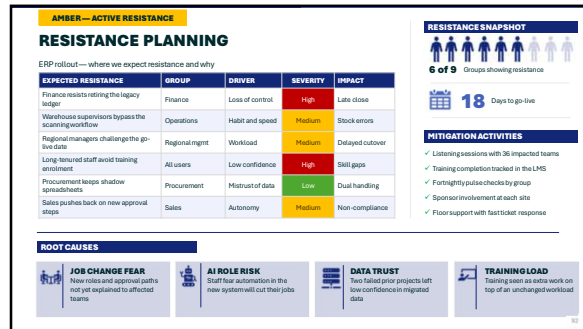
RISK REGISTER

RISK	CATEGORY	LIKELIHOOD	SEVERITY	MITIGATION	OWNER	REVIEW DATE	NEXT ACTION
Describe the risk	Business area	HIGH	LOW	What we are doing about it	Owner	QS MAY	The next step
Describe the risk	Business area	HED	HED	What we are doing about it	Owner	QS MAY	The next step
Describe the risk	Business area	HED	HED	What we are doing about it	Owner	QS MAY	The next step
Describe the risk	Business area	HED	HED	What we are doing about it	Owner	QS MAY	The next step
Describe the risk	Business area	HED	HED	What we are doing about it	Owner	QS MAY	The next step
Describe the risk	Business area	HED	HED	What we are doing about it	Owner	QS MAY	The next step

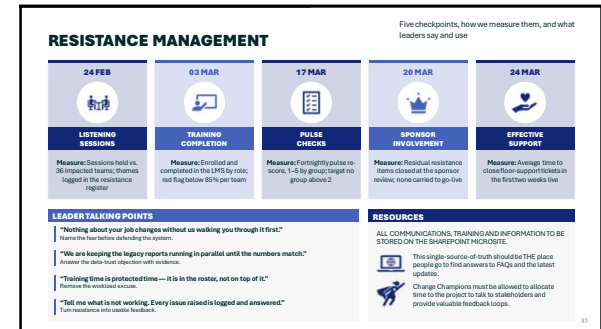
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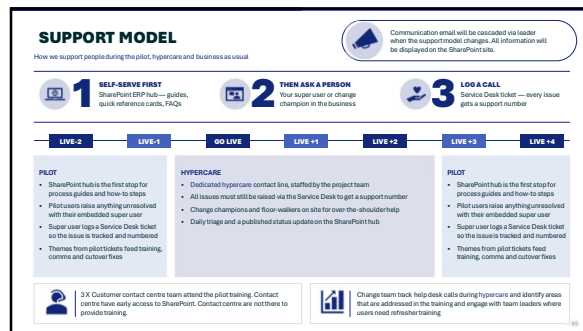
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HYPERCARE: SEVERITY, ESCALATION AND AFTER-HOURS RESPONSE

SEVERITY	WHAT IT LOOKS LIKE	RESPONSE & FIX TARGET	ESCALATION PATH
P1 Business stopped	System down or a core process fails—no one can stop, timeout or pag, or a cutover deadline is at risk	Respond 15 min - workaround within 2 hrs, hourly updates	Service Desk + Hypercare lead + ERP Programme Director + SLT sponsor/pager, war room stand-up
P2 Team stopped	A team or site can't complete a core process; a manual workaround exists but doesn't scale	Respond 30 min - fix same day - updates every 4 hrs	Service Desk + Hypercare lead + process owner, SLT notified if unresolved after 24 hrs
P3 Individual blocked	One user or a small group is blocked—access, a failed posting, a report not reconciling	Respond 4 hrs - fix within 2 business days	Service Desk + super user + functional analyst, reviewed at daily triage
P4 Question or request	How-to question, data tidy-up, cosmetic issue or enhancement idea	Respond 1 business day - scheduled into the backlog	Service Desk + super user; enhancement log reviewed weekly by the ERP team

CORE HOURS - 07:00-18:00

Full hypercare floor: Service Desk, floor walkers and ERP team on deck. P1s raised in the war room within 15 minutes and status posted to the hub.

EVENING & WEEKEND COVER - 18:00-22:00

On-call roster: P1 and P2 only—the Service Desk rings the on-call lead. P3 and P4 queue for the next morning's triage call.

OVERNIGHT, MONTH-END & CUTOVER PEAKS

P1 only: duty manager phones the ERP Programme Director direct. If the business is still stopped at 2 hours, the SLT sponsor is engaged and a comms hold line is issued.

Severity is agreed between the Service Desk and the business owner—if you disagree with the rating, escalate to the hypercare lead rather than leaving it unattended. Targets shown are indicative and to be confirmed with IT service management.

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CHANGE CHAMPION VS SUPERUSER

SUPERUSER

SUPERUSER – the system expert in the business. A respected team member who knows the day-to-day process, learns the new ERP early, tests it, and then trains and supports colleagues at the desk.

CHANGE CHAMPION

CHANGE CHAMPION – the people connector in the business. A trusted voice who builds buy-in, shares the why, surfaces concerns early, and keeps their team engaged and ready to go-live.

SYSTEM & TESTING

Super User – Tests scenarios in the new ERP, logs defects, and checks data and configuration match real work.

Change Champion – Gathers team reaction to the new ways of working and feeds concerns back to the Change team.

PROCESS & TRAINING

Super User – Runs hands-on training, builds quick guides, and shows colleagues the new steps in their process.

Change Champion – Explains why the process is changing and what it means for the team's daily work.

COMMUNICATION

Super User – Shares practical system updates, tips, and workarounds; answers how-to questions as they come up.

Change Champion – Cascades key messages and milestones, and keeps the conversation two-way between team and project.

SUPPORT & ISSUES

Super User – First point of contact for system issues; triages, resolves simple ones, escalates the rest.

Change Champion – Spots resistance, fatigue, or confusion in the team and raises it before it becomes a blocker.

GO-LIVE & ADOPTION

Super User – Provides floor-walking support at go-live and checks that new transactions are done correctly.

Change Champion – Celebrates early wins, recognises adopters, and keeps momentum until the new way is normal.

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CHANGE CHAMPION SUMMARY

YOUR ROLE

You are the local voice of the ERP rollout. One central change team supports 4,500 staff across 5 sites, so champions are how the program reaches every desk. You know your team's real workflows and can translate what the new system means for daily work.

YOUR COMMITMENT

- Around 4 hours per week, rising to 8 hours through go-live and hypercare.
- Fortnightly champion network call, monthly site briefing, and a weekly feedback loop with your change lead.

CHANGE CHAMPION TASKS

- Attend champion briefings and learn the new finance, procurement and HR processes before go-live.
- Run short team walkthroughs and demos so colleagues see the system in their own workflow.
- Collect questions, issues and process gaps, and log them to the change team each week.
- Help validate processes during UAT and check data in your area is clean and complete.
- Support your team through go-live and hypercare, coaching on the desk and flagging blockers fast.

WHAT'S IN IT FOR YOU?

- You build skills, early experience in system your organisation will run on for the next decade.
- You gain visibility with senior leaders, sharpen your facilitation and coaching skills, and grow a network across every site.
- Champion experience is recognised in your development plan and is a proven stepping stone into process owner and super user roles.

MONTH 1

Champion onboarding: program vision, scope and your role in the rollout.

MONTH 2

Process design walkthroughs, map how your team works today versus the new ERP.

MONTH 3

User acceptance testing and data cleansing in your area.

MONTH 4

Champion train-the-trainer: run local demos and readiness conversations.

MONTH 5

End user training delivery and go-live readiness checks.

MONTH 6

Go-live and hypercare: floor support, issue triage and adoption tracking.

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NETWORK COVERAGE

Champion coverage by area.

AREA 1	AREA 2	AREA 3	AREA 4
HEADCOUNT: 342	HEADCOUNT: 342	HEADCOUNT: 342	HEADCOUNT: 342
CHAMPIONS: - Name - Name - Name	CHAMPIONS: - Name - Name - Name	CHAMPIONS: - Name - Name - Name	CHAMPIONS: - Name - Name - Name
Additional notes required for this area.	Additional notes required for this area.	Additional notes required for this area.	Additional notes required for this area.

AREA 5	AREA 6	AREA 7	GAPS
HEADCOUNT: 342	HEADCOUNT: 342	HEADCOUNT: 342	
CHAMPIONS: - Name - Name - Name	CHAMPIONS: - Name - Name - Name	CHAMPIONS: - Name - Name - Name	
Additional notes required for this area.	Additional notes required for this area.	Additional notes required for this area.	

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MEET OUR CHAMPIONS

OPERATIONS

Nadia Hamman, Colin Whitaker, Piya Desai

FINANCE

Elena Petrova, Samuel Achobe, Grace Lim

CUSTOMER SERVICE

Tom Bradley, Aisha Malik, Diego Ramos

PEOPLE & CULTURE

Fiona Kelly, Hiro Nakamura, Zee Bennett

TECHNOLOGY

Owen Fraser, Lena Kowalski

SALES & MARKETING

Matt Johnson, Chloe Duval

RISK & COMPLIANCE

Hannah Reid, Victor Nowak, Maya Sharma

SUPPLY CHAIN

Peter Novak, Amelia Cross, Kofi Mensah

LEGAL & GOVERNANCE

Ruby Sinclair, Andrew Tan

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SPONSOR PLAN – FIRST 100 DAYS

Project synopsis. Make it easy for the sponsor to talk about this project in a simple sentence. Use this space to give a clear one or two paragraph description of the reason for the project and what the intention is. The sponsor may be juggling multiple projects and priorities. Make it easy for them.

Why? Give this sponsor an easy explanation of why this project is happening.

FIRST 10 DAYS

NEXT 50 DAYS FROM DOWPH TO DOWPM

AT LAUNCH

IMMERSION

Understand the business case, scope and MVP, and how this aligns with corporate values and strategy.

MEET

Meet the people who matter. Who must be involved, who can help and who may resist.

MONITOR

How will we know this works? What metrics exist, or can be put in place to track progress.

SUPPORT

Approve the design and the change delivery plan. Prepare leaders for engagement, comms and training.

PETITION

Give the change team access to leaders, and protect time for training and practice.

ADVOCATE

Advocate for the benefits through resistance. Ask the SLT to prioritise the project.

CELEBRATE

Champion the change. Drive adoption, measure success, and celebrate team wins.

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SECTION

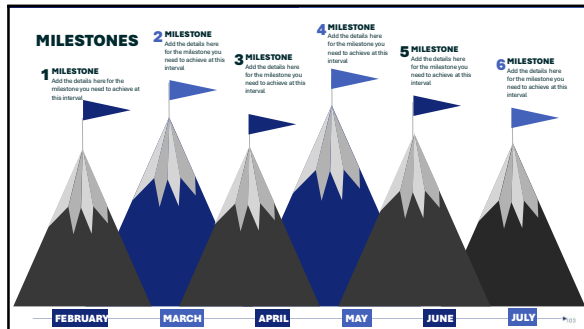
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SUCCESS & READINESS

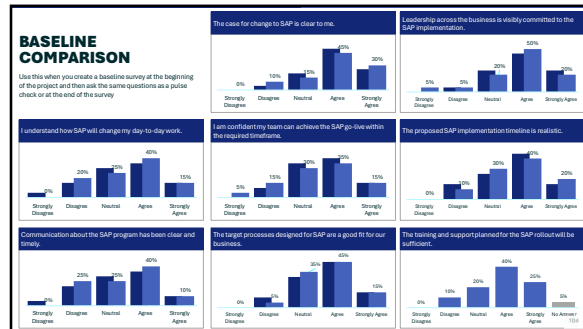
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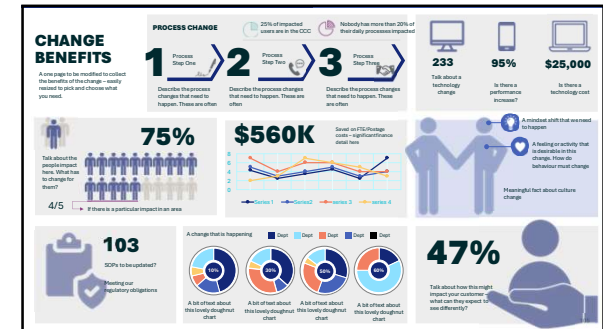
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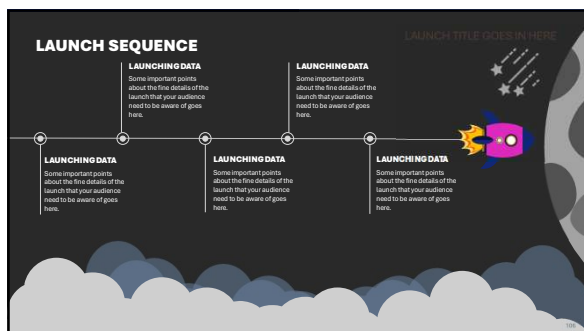
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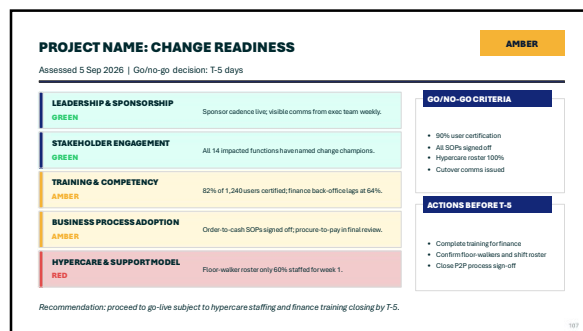
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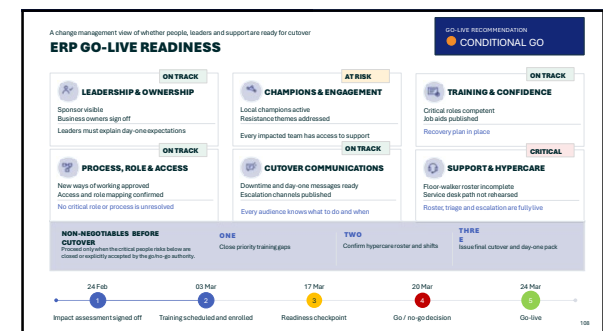
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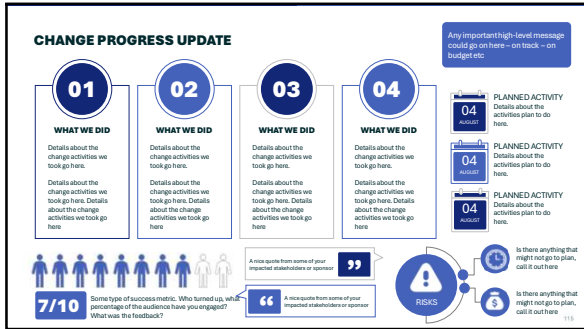
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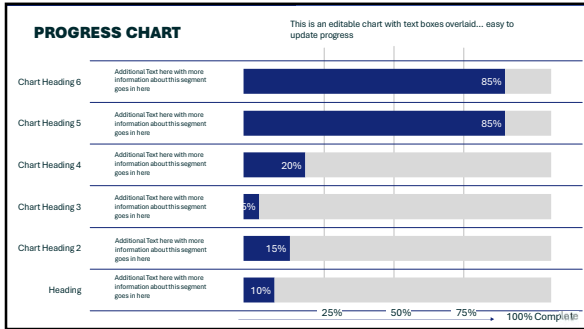
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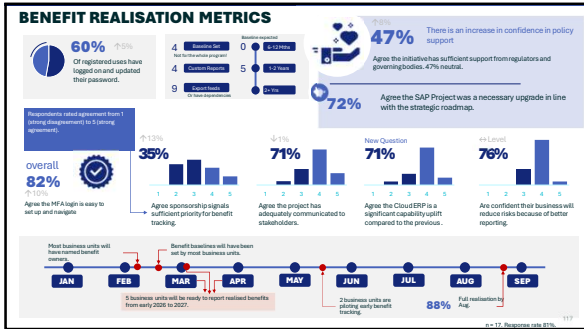
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POST IMPLEMENTATION REVIEW

Initiative name: Initiative name:

Change Manager: CH Name:

Project Manager: PM Name:

Facilitator Name: Facilitator Name:

Project Sponsor: Sponsor Name:

Go Live Date: Date:

Review Date: Date:

PROJECT SYNOPSIS
Give a high level summary of the project intention.

SUCCESS METRICS
Describe the methods you used to measure if the project was successful.

KEY DELIVERABLES AND SCOPE
What did you set out to achieve.
• List the deliverables and any KPIs
• List the deliverables and any KPIs
• List the deliverables and any KPIs

CONSULTED AUDIENCE
Who is involved in this review. List their names here.
FirstName LastName : Job Title, Area
FirstName LastName : Job Title, Area
FirstName LastName : Job Title, Area
FirstName LastName : Job Title, Area
FirstName LastName : Job Title, Area

TAKE-AWAYS
• List the high-level learnings that will be passed on to the next project. This is the summary page you'll dig deeper into each one on subsequent pages.
• List the high-level learnings that will be passed on to the next project. This is the summary page you'll dig deeper into each one on subsequent pages.
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POST IMPLEMENTATION REVIEW

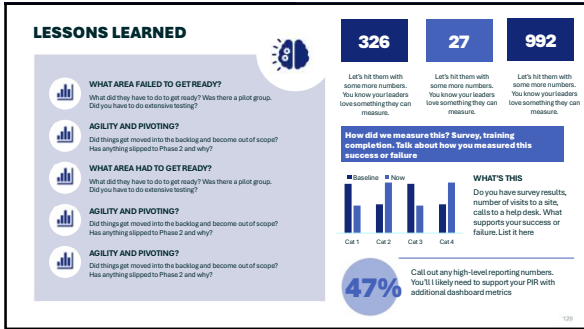
A short project synopsis so anyone reading this from another project would understand what the project was about.

PROJECT NAME
What we set out to do:
1. Describe what you set out to achieve and why it was important.
2. Describe what you set out to achieve and why it was important.
3. Describe what you set out to achieve and why it was important.
4. Describe what you set out to achieve and why it was important.
5. Describe what you set out to achieve and why it was important.
6. Describe what you set out to achieve and why it was important.

WHAT WE DID WELL
Something that was done well – high level name for this item:
Creating a SharePoint micro-site as a single source of truth.
The one-stop shop directed all users to a single place for questions and training. It was easier to keep track of artefacts and we captured valuable visitor metrics.
Using Change Champions to cascade information.
Champions in the business were integral to the success as they had back information that we would have otherwise missed and ensured communications were cascaded.

WHAT WE DIDN'T DO SO WELL
Lack of information on the internet.
We failed to maximise use of other communication tools such as Viva engage.
Under-estimating involvement from the Champions.
We had not correctly assessed the amount of time it would take for the champions to digest the information and attend regular briefings. Subsequently many dropped out due to work pressure.

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WHAT WE DID WELL		
Capture the strengths worth repeating		
HEADING	DETAILS AND EVIDENCE	NEXT ACTION
[Strength 1]	[What worked well? Add an example and the benefit it created.]	[How well we repeat or embed this?] Owner: [Name] Due: [Date]
[Strength 2]	[What helped the team deliver? Add feedback or a measure.]	[What will we carry into the next project?] Owner: [Name] Due: [Date]
[Strength 3]	[What helped people adopt the change? Add supporting evidence.]	[What should we share more widely?] Owner: [Name] Due: [Date]

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WHAT WE COULD HAVE DONE BETTER		
Focus on the cause and the change needed next time		
HEADING	DETAILS AND IMPACT	NEXT ACTION
[Improvement 1]	[What fell short? Describe the impact and likely cause.]	[What specific change will address this?] Owner: [Name] Due: [Date]
[Improvement 2]	[Where did delays or rework occur? Add an example.]	[What will prevent a repeat?] Owner: [Name] Due: [Date]
[Improvement 3]	[What made adoption harder? Add feedback or a measure.]	[What support or process will change?] Owner: [Name] Due: [Date]

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MILESTONE ACHIEVED

Congratulations
TEAM NAME

WE DID IT
More information about the spectacular achievement your team has realised this week! Go you!!

Special thanks to Team Member (name for their outstanding contributions to our success)

MILESTONE ONE
Savings of £250k by reducing workload and admin reporting

MILESTONE TWO
Faster application processing times, better for customers

MILESTONE THREE
Adopted manual processes, freeing up team resources for valuable work

MILESTONE FOUR
New target operating model ready to hand over to BAU

123



01 Text in here to stay on target for your project. Text in here to stay on target for your project.

02 Text in here to stay on target for your project. Text in here to stay on target for your project.

03 Text in here to stay on target for your project. Text in here to stay on target for your project.

04 Text in here to stay on target for your project. Text in here to stay on target for your project.

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APPENDIX

SUPPORTING SLIDES

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ADKAR

AWARENESS

A

Describe what you have done to ensure the audience knows this is happening

DESIRE

D

What have you communicated about the benefits of adoption or consequences of not adopting

KNOWLEDGE

K

Summarise the training or learning goals. Before how you will share appropriate knowledge

ABILITY

A

How will you check for readiness to this is needed to overcome difficulties, to share a tool

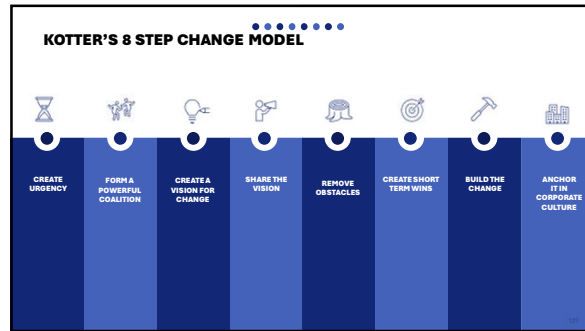
REINFORCE

R

How is this handled over to BAU and owned by the business

JAN FEB MAR APR MAY JUN JUL

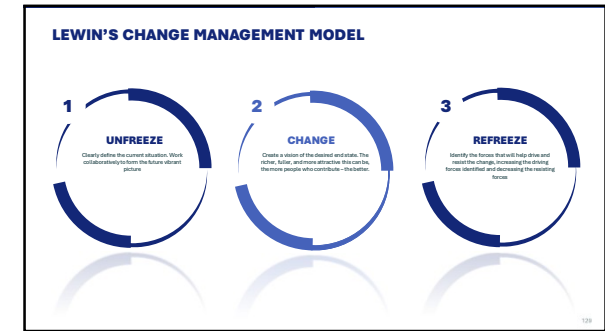
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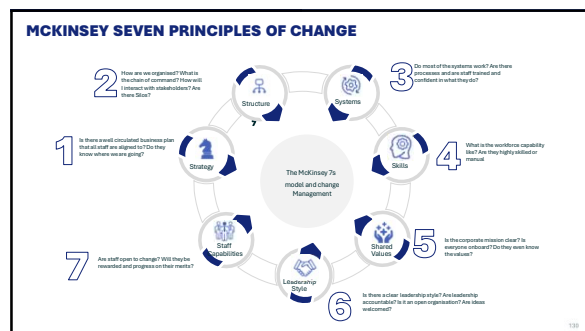
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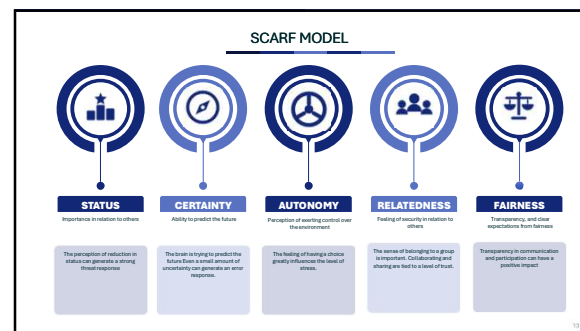
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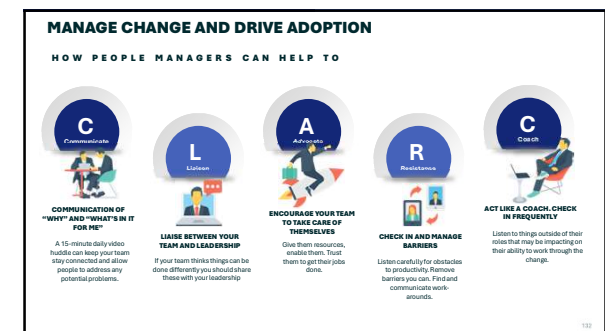
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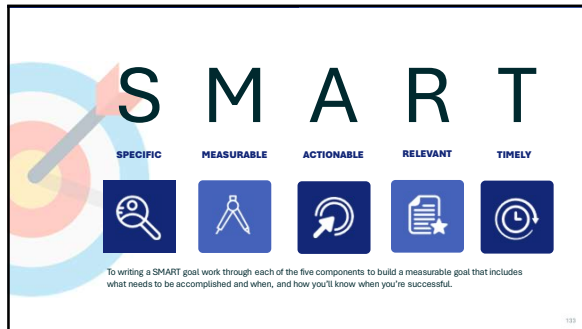
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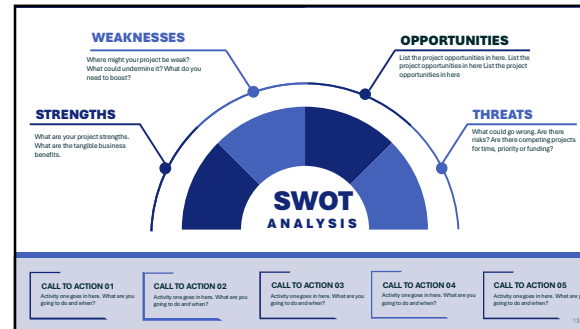
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133



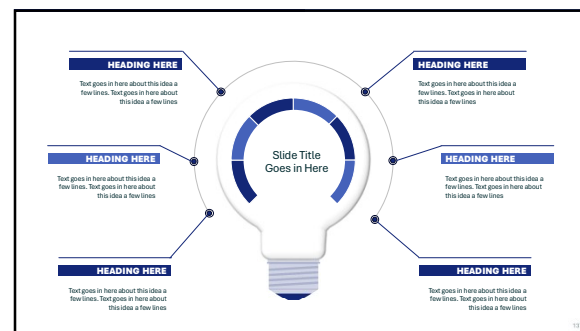
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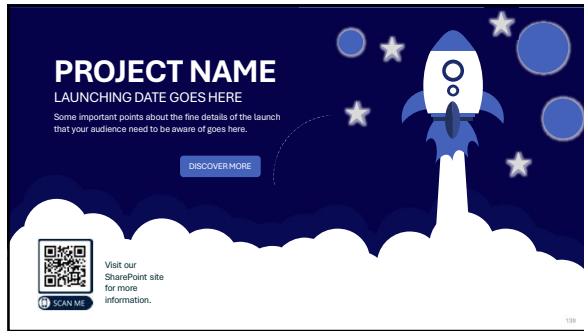
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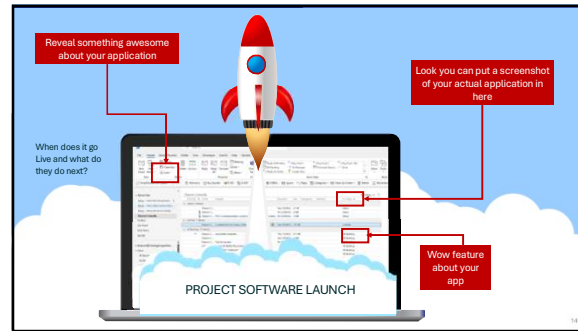
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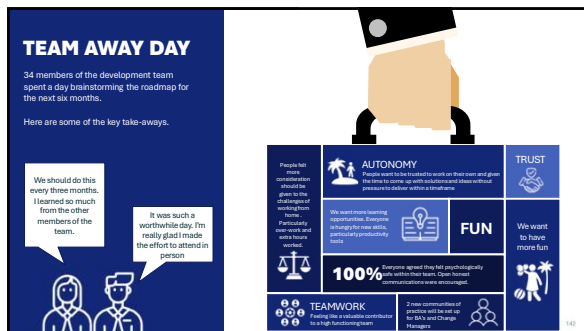
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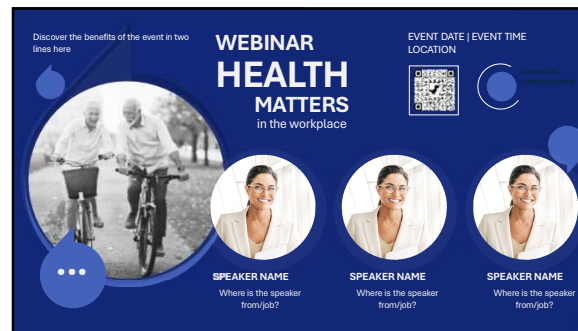
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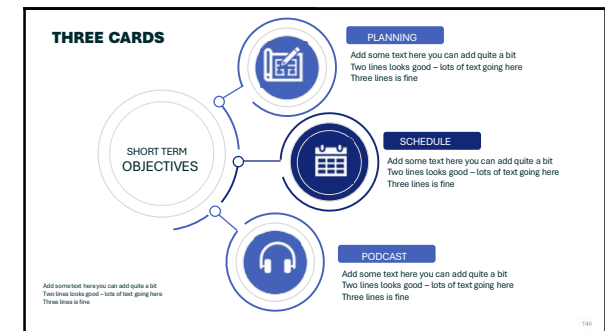
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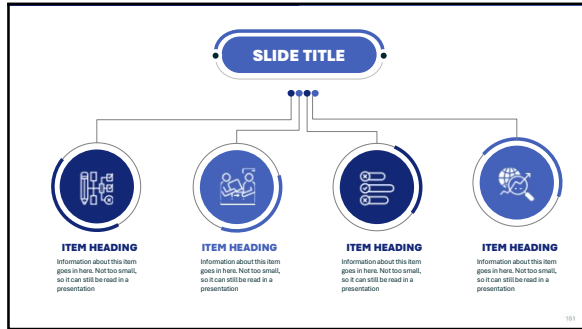
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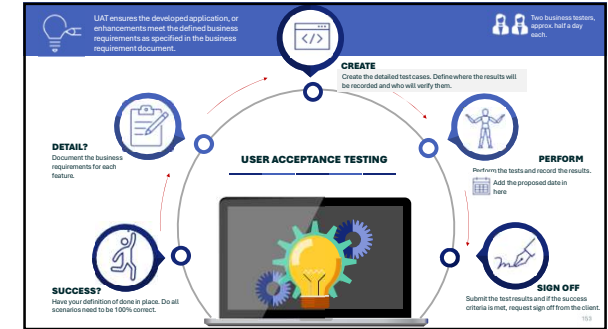
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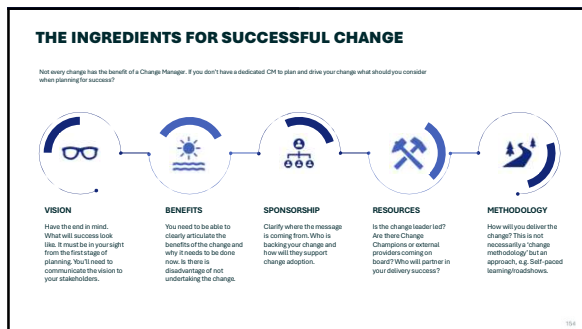
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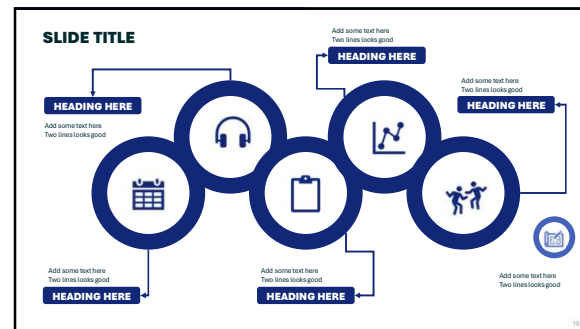
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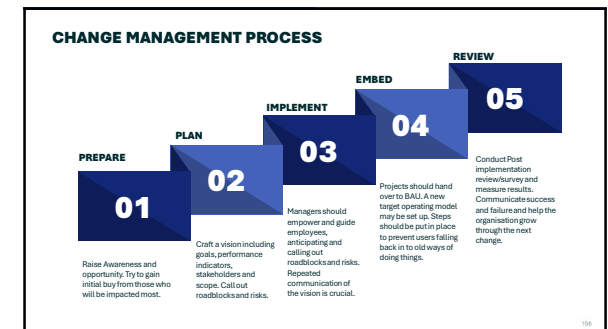
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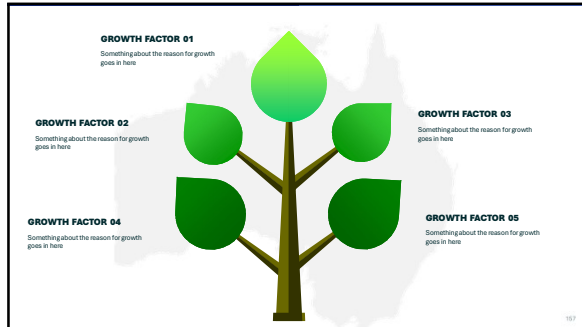
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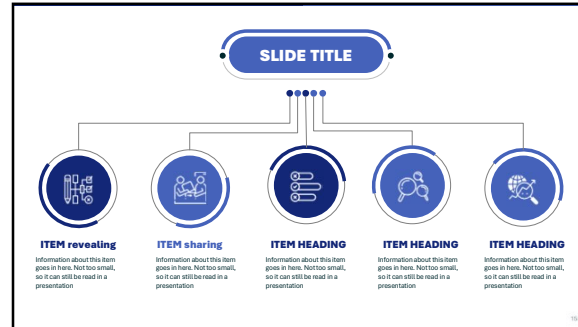
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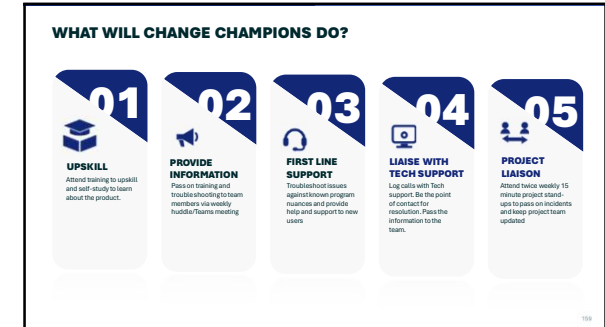
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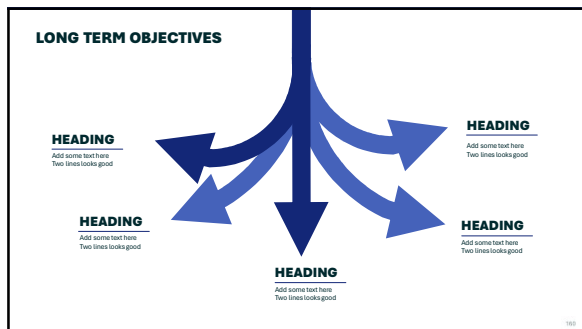
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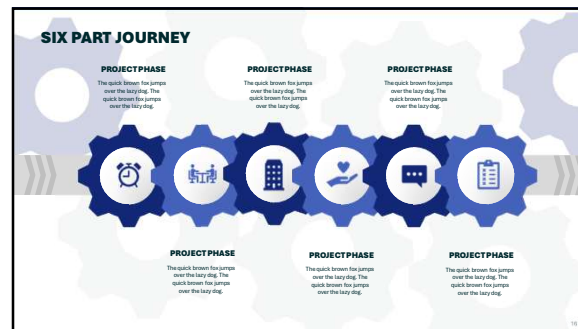
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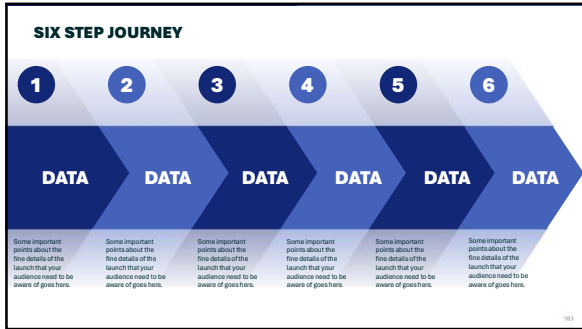
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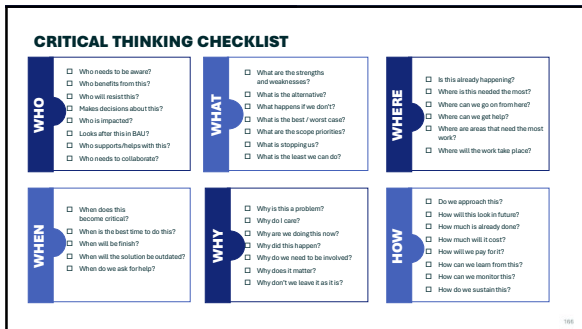
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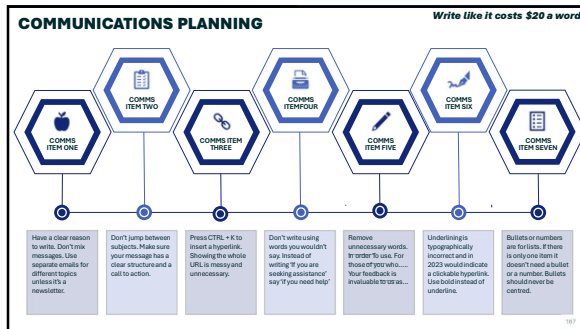
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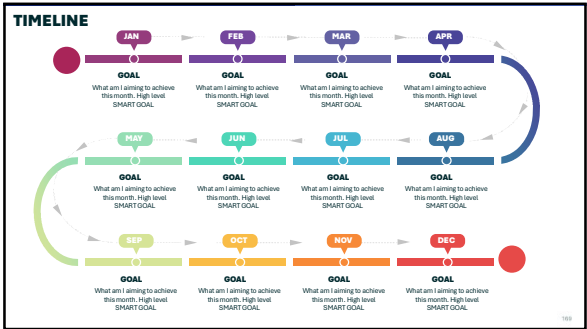
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