Introduction to the OCM Executing Process Phase Checklist Template

Once the OCM activities within the Executing Process Phase are complete, the phase checklist should be reviewed and completed. The checklist assists the project team in quickly and confidently identifying areas of concern early on.

Instructions and descriptions are provided to help the reader understand each section’s purpose and how to complete it.

Template style conventions are as follows:

| Style | Convention |
| --- | --- |
| Normal text | Indicates placeholder text that can be used for any project. |
| [Instructional text in brackets] | [Indicates text that is be replaced/edited/deleted by the user] |
| *Example text in italics* | *Indicates text that might be replaced/edited/deleted by the user* |

As you complete the template, please remember to delete all instructional text (including this section) and update the following items, as applicable:

* title page
* version history
* table of contents
* headers
* footers

Update the document to a minor version (e.g., 1.1, 1.2) when minimal changes are made and a major version (e.g., 2.0, 3.0) when significant changes are made.

OCM Executing Process Phase Checklist

[Once the activities within the Executing Process Phase are complete, the phase checklist should be reviewed and completed. Completion of tasks and deliverables may include:

* Assessing Organizational Change Readiness
* Updating the OCM plan
* Executing and monitoring the effectiveness of OCM activities
* Assessing Stakeholder communication needs
* Updating the Communication Management Plan
* Delivering project communications
* Assessing management in impacted area for support
* Conducting Team Guidelines Surveys, Team Effectiveness Surveys, and facilitated sessions
* Updating the Stakeholder Management Plan
* Identifying stakeholder group representative resources needs and resources
* Identifying OCM super user resource needs and resources
* Planning for training
* Developing training
* Conducting training
* Other OCM specific documents or activities should be added as project needs dictate

In the table below, enter each document /activity that should be completed during this process phase. Identify the knowledge area, task owner, their role for each document /activity, and provide its completion date.]

| Knowledge Area | Document/Activity Completed | Task Owner Name, Role | Date |
| --- | --- | --- | --- |
| OCM Lifecycle Management  | Completed Organizational Change Readiness Assessments  | [Identify the person who confirmed completion] | [completion date] |
| OCM Lifecycle Management | Updated OCM Plan | [Identify the person who confirmed completion] | [completion date] |
| OCM Lifecycle Management | Completed OCM Schedule | [Identify the person who confirmed completion] | [completion date] |
| Communication  | Updated Communication Management Plan  | [Identify the person who confirmed completion] | [completion date] |
| Communication | Completed Stakeholder Communication Questionnaires  | [Identify the person who confirmed completion] | [completion date] |
| Communication | Completed Communication Feedback Surveys | [Identify the person who confirmed completion] | [completion date] |
| Communication | Completed Communication Action Log | [Identify the person who confirmed completion] | [completion date] |
| Leadership Support | Completed Manager and Supervisor Interviews | [Identify the person who confirmed completion] | [completion date] |
| Leadership Support | Completed Leadership Support Action Log | [Identify the person who confirmed completion] | [completion date] |
| Team Dynamics | Completed Team Guidelines Surveys, Team Effectiveness Surveys, and Follow Up Sessions | [Identify the person who confirmed completion] | [completion date] |
| Team Dynamics | Completed Team Dynamics Action Log | [Identify the person who confirmed completion] | [completion date] |
| Stakeholder Enrollment | Updated Stakeholder Management Plan  | [Identify the person who confirmed completion] | [completion date] |
| Stakeholder Enrollment | Updated Stakeholder Register | [Identify the person who confirmed completion] | [completion date] |
| Stakeholder Enrollment | Completed Stakeholder Enrollment Action Log | [Identify the person who confirmed completion] | [completion date] |
| Training  | Completed Training Plan  | [Identify the person who confirmed completion] | [completion date] |
| Training  | Training Curriculum | [Identify the person who confirmed completion] | [completion date] |
| Training  | Training Materials | [Identify the person who confirmed completion] | [completion date] |
| Training  | Completed Training Action Log | [Identify the person who confirmed completion] | [completion date] |
| N/A | Completed OCM Executing Process Phase Checklist | [Identify the person who confirmed completion] | [completion date] |