**[Insert Department Name]**

**OCM Plan**

**[Insert Project Name]**

Version History

| Version # | Date | Author | Key Differences |
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Introduction to the OCM Plan Template

During the Concept, Initiating, and Planning Process Phases, OCM efforts focus on the project team, Project Manager, Project Sponsor, and any Stakeholders involved in planning for the implementation effort. The OCM Practitioner generates a schedule of OCM activities focused on this planning group based on the results of the following inputs:

* Environmental Readiness Assessment
* Project Sponsorship Assessment
* Executive Interview Guide
* Observations and feedback on the OCM effort.

As the project progresses to the Executing Process Phase, much more time and effort is required for OCM activities and tasks, including the development of an OCM Plan.

The OCM Practitioner typically develops the OCM Plan with input from the Project Sponsor, Project Manager, project team, and any appropriate Stakeholders. Generally, one of the key objectives for projects is to balance people-related needs without sacrificing project goals.

In smaller and less complex project environments, the OCM approach can be documented within the Stakeholder Management Plan and Communication Management Plan and may not require a stand-alone OCM Plan. Conversely, larger and more complex projects with numerous people-related needs may require a much higher level of attention to OCM efforts.

The OCM Plan Template with Instructions provides guidelines for completing the OCM Plan. Additional hints, examples, and suggestions are included within each of the template sections and/or tables where key information is recorded.

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.

# Introduction

The OCM Plan is developed during the project’s Executing Process Phase; however, OCM activities may occur in earlier process phases based on the identification of a need for OCM efforts at that time. The intended audience of the OCM Plan includes the OCM Practitioner, Project Manager, project team, Project Sponsor, and essential Stakeholders whose support is vital to carrying out the plan.

The OCM Plan identifies the approach to managing the efforts in all six OCM Knowledge Areas:

* OCM Lifecycle Management
* Communication
* Leadership Support
* Team Dynamics
* Stakeholder Enrollment
* Training

[For the Introduction section of the OCM Plan, provide a brief overview of the project and a high-level overview of the approach to managing people-related efforts. Include the goals and objectives of the OCM Strategy for the project and any special or specific OCM needs known at this time. Effectively addressing the people-related aspects of a project is a key component of successful project management and can be used to gain support for a project as well as help anticipate resistance, conflict, or competing objectives amongst the project’s Stakeholders. Reference the CA-OCM for additional information.]

# Scope

The scope of the OCM effort provides information regarding how the OCM effort and activities are tailored to the specific organization and project based on the needs of the organization and Stakeholders.

[The OCM scope refers to the extent to which knowledge area activities are implemented for different Stakeholder groups. Elements to consider include:

* Knowledge areas included in the effort
* Timeframes, including the start date and estimated completion date of all knowledge area efforts
* Target audiences for each knowledge area, or for each knowledge area activity]

# Roles and Responsibilities

The table of Roles and Responsibilities below provides descriptions of duties for project roles in the OCM effort.

[Complete the Roles and Responsibilities table provided by determining the names, roles and responsibilities that are involved in OCM for your project.]

*Example:*

| Name | Role | Responsibility |
| --- | --- | --- |
| [Name] | *Project Sponsor* | * *Provide advice in preparation strategies to be included in the OCM Plan*
* *Approve the OCM Plan*
* *Play a lead role in representing the project to internal and external Stakeholders*
 |
| [Name] | *Project Manager* | * *Initiate effort to develop the OCM Plan*
* *Guide initial organizational readiness analysis*
* *Complete the OCM Plan*
* *Manage the schedule and activities related to the efforts in all OCM knowledge areas*
 |
| [Name] | *OCM Practitioner* | * *Undertake the organizational readiness analysis in consultation with the project team and the sponsoring organization’s staff*
* *Write the OCM Plan*
* *Review with the project team and the sponsoring organization’s staff*
* *Lead the effort to complete the approach identified in the OCM Plan*
 |
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# OCM Knowledge Areas

Describe the OCM approach, which includes OCM Lifecycle Management, Communication, Leadership Support, Team Dynamics, Stakeholder Enrollment, Resistance Management, Workforce Transition, and Training. Define the processes within each knowledge area clearly enough to identify the necessary steps, activities, and responsibilities to manage the OCM effort for the entire project lifecycle.

## OCM Lifecycle Management

OCM Lifecycle Management plans, defines, and manages the activities necessary to transition the organization and its people to a future state. The activities in this knowledge area govern the performance of all other knowledge area activities and guide management activities that are specific to OCM. OCM Lifecycle Management provides the tools necessary for OCM practitioners to manage the OCM effort throughout the project, as well as identify areas that can be customized within the OCM effort.

[In the OCM Lifecycle Management section, describe the strategy for managing the OCM effort. This can include assessing needs and readiness, identifying OCM activities and tasks, and evaluating the effectiveness of OCM efforts. Consider how the project will identify and address OCM needs and people-related concerns. Reference the CA-OCM, OCM Lifecycle Management sections in all process phase chapters for additional information.]

## Communication

Communication creates awareness and understanding in order to obtain stakeholder buy-in and reduce employees’ resistance to change. All communication elements should be carefully considered in order to inform and engage employees and Stakeholders. These elements include:

* Stakeholder communication requirements
* Information collection sources and responsibilities
* Distribution channels
* Communications register
* Guidelines for project communication meetings
* Project meetings schedule
* Communication tools
* Methods for storage, retrieval, and disposal of communications

These communication elements help define the communication process as a whole.

[In the Communication section, describe the strategy for managing the communication process. Reference the CA-PMF Planning chapter, Communication Management section, the CA-OCM Communication Knowledge Area sections, and the Communication Management Plan Template for more information.]

## Leadership Support

Leadership Support increases leadership involvement in and support for change initiatives. Understanding leadership is imperative to understanding the organization’s culture and providing a lever for changing the culture. Leadership Support activities inform and enroll key leaders in the change effort, coach leaders in acting as role models, and increasing visibility of leadership support at all levels.

[In the Leadership Support section, describe the strategy for assessing and coaching leaders and managing the Leadership Support process. Reference the CA-OCM Leadership Support sections in all process phase chapters for more information.]

## Team Dynamics

Team Dynamics creates a cohesive project team and maintains effective team dynamics utilizing shared team behavior guidelines, facilitated sessions, and self-evaluations. The overall project team may consist of individuals representing different organizations, such as state and contractor employees, as well as different disciplines, such as project management, OCM, BPR, and technical professionals.

[In the Team Dynamics section, describe the strategy for identifying and introducing team behaviors, assessing team culture, and mitigating team dynamics issues should they arise. Reference the CA-OCM Team Dynamics Knowledge Area in each of the process phase chapters for more information.]

## Stakeholder Enrollment

Stakeholder Enrollment defines, plans, and manages the effort to identify and engage Stakeholders in the change initiative. Stakeholder Enrollment builds off the Stakeholder identification and management processes identified in the CA-PMF and serves to involve Stakeholders in the project.

[In the Stakeholder Enrollment section, describe the strategy for identifying and managing Stakeholders and Stakeholder groups. Reference the CA-PMF, Stakeholder Management Process in the Planning Process Phase chapter and the CA-OCM, Stakeholder Enrollment Knowledge Area in the Executing Process Phase Chapter for more information.]

## Training

Training provides end users with thoughtful, applicable training in preparation for the transition into the future state. The Training effort includes: planning, developing, delivering, and evaluating training for all end users.

[In the Training section, describe the strategies for planning, developing, delivering, and evaluating an end user training program. Reference the CA-OCM, Training Knowledge Area in the Planning, Executing, and Closing Process Phase Chapters as well as the Training Plan Template for more information. The strategies provided in this section should align with the project’s Training Plan.]