Introduction to the OCM Planning Process Phase Checklist Template

Once the OCM activities within the Planning Process Phase are complete, the process 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 Planning Process Phase Checklist

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

* Determining and Planning for OCM Activities
* Assessing Organizational Change Readiness
* Developing the OCM Plan
* Conducting OCM Activities
* Developing a Communication Management Plan
* Delivering Planning Process Phase Communications
* Supporting and Assisting the Project Sponsor
* Supporting Executive Leadership
* Conducting the Team Guidelines Session
* Identifying the Training Method and Approach

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 OCM Schedule | [Identify the person who confirmed completion] | [completion date] |
| OCM Lifecycle Management | Completed Organizational Change Readiness Assessments | [Identify the person who confirmed completion] | [completion date] |
| OCM Lifecycle Management | Completed OCM Plan | [Identify the person who confirmed completion] | [completion date] |
| Communication | Completed Communication Management Plan | [Identify the person who confirmed completion] | [completion date] |
| Communication | Completed Communication Management Plan Feedback Channels Amendment | [Identify the person who confirmed completion] | [completion date] |
| Communication  | Completed Communication Activity Log | [Identify the person who confirmed completion] | [completion date] |
| Leadership Support | Completed Executive Interview Guides | [Identify the person who confirmed completion] | [completion date] |
| Leadership Support | Updated Project Sponsorship Action Register | [Identify the person who confirmed completion] | [completion date] |
| Leadership Support  | Completed Leadership Support Activity Log | [Identify the person who confirmed completion] | [completion date] |
| Team Dynamics  | Completed Team Guidelines Session | [Identify the person who confirmed completion] | [completion date] |
| Team Dynamics  | Completed Team Dynamics Action Log | [Identify the person who confirmed completion] | [completion date] |
| Training  | Completed Draft Training Plan Section 2: Approach) | [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 Closing Process Phase Checklist | [Identify the person who confirmed completion] | [completion date] |