**Activity book - Task 4**

**Unit 417 – Managing and implementing change in the workplace**

**Unit 501 – Managing Improvement**

**Unit 511 – Managing projects in the organisation**

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**Assessment criteria covered**

**Unit 417 – Managing and implementing change in the workplace**

2.2 Assess the benefits and risks of implementing the identified opportunity for change

2.3 Develop a change implementation plan including details of how you will monitor and review the implementation of change

**Unit 501 – Managing Improvement**

2.1 Develop and improvement plan that is designed to meet, and if possible, exceed customer requirements

**Unit 511 – Managing projects in the organisation**

1.2 Plan the implementation of a project within own organisation

**Task 4a: Assessing benefits and risks**

**Unit 417 - 2.2 Assess the benefits and risks of implementing the identified opportunity for change**

From your environmental and organisational analysis in task 3, you identified an opportunity for change within your organisation. You will now need to assess the benefits and risks of implementing this opportunity in some detail. This will allow you to plan for the risks and put a mitigation plan in place.

To ‘assess’ effectively you must make a judgement, focusing on the impact and outcomes of each benefit and risk.

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| --- | --- | --- |
| Description of benefit | Criteria for assessing | To what degree will this benefit **impact** on the organisation? Why do you say this? Do you have any evidence to support? What would be the **outcome**?  |
| e.g. Increased customer satisfaction | Rare/ unlikely/ possible/ likely/ almost certain |  |
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| --- | --- | --- |
| Description of risk | Criteria for assessing | To what degree could this risk **impact** on the organisation? Why? What would be the **outcome**? Do you have any evidence to support? |
|  | Rare/ unlikely/ possible/ likely/ almost certainL/M/H |  |
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**Task 4b: Change Management Plan**

**Unit 417 – 2.3 Develop a change implementation plan including details of how you will monitor and review the implementation of change**

**Unit 501 – 2.1 Develop and improvement plan that is designed to meet, and if possible, exceed customer requirements**

**Unit 511 1.2 Plan the implementation of a project within own organisation**

This next section is about creating a plan for your identified change.

In task 3, you learnt about different project management tools and techniques. You will now need to put these tools into use within our own plan. Consider what tools and techniques would be the most appropriate and they can be embedded into the change management plan template below. We have already included some to help you with the development of your plan.

\*\* The template below is optional. You are free to create your plan in a way which would suit you and your organisation the best. However, please ensure that the ACs listed above are fully covered.

**Change Management Plan**

**for**

***organisation name/ project name/ logo***

***(Please remove guidance notes as each section is being completed)***

**Introduction**

*The introduction should describe the purpose of the document and the business context of the change that is proposed.*

**Current position of organisation**

*This section should describe the current position of the organisation regarding the proposed change - the readiness of the organisation to participate in the change.*

**Scope and objectives**

*The scope of the proposed change needs to be outlined in terms of what the fundamentals of the proposed change are and which areas of the organisation are going to be affected. The objectives of the change should be highlighted.*

* *What is the overall aim?*
* *What are the objectives?*
* *How will it meet /exceed customer requirements?*

**How will we get there?**

*What are our options? In here, you could include a copy of a* ***brainstorm activity*** *where options have been explored and a clear decision made about the way forward.*

**Implementation plan**

*An implementation plan showing a timeline for all of the elements of change that need to be addressed should be developed and included in this section.*

**Improvement Plan**

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| What needs to be improved? | What will be done to achieve this? | What resources and support required? | What will the success criteria be? | Review and completion dates |
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**Communication plan**

*This section should plan the communication of the change. It is important that people understand the context, the reasons for the change, the implementation plan and the impact on roles and responsibilities. The proposed communication events and channels of communication should be included in this section, e.g. briefings, presentations, bulletins etc.*

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| --- | --- | --- | --- |
| Date | What needs to be communicated? | Stakeholders involved | How will it be communicated? |
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**Timeline for project**

In this section, you could create a gantt chart and/or critical path analysis as a visual to show the project plan from start to end.

**Proposed monitoring of change plan**

*The proposed mechanisms for monitoring the progress of the change plan and the reactions of stakeholder groups to the communications of the change should be covered in this section.*

*How will you monitor that the change plan? Please provide details of all monitoring techniques you will use.*

*How will it be reviewed? How often? By whom? Will this be reported back to anyone?*

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| --- | --- | --- | --- |
| Date of monitoring and review | Monitoring technique (e.g. team meeting, questionnaire, forum) | What information is required? | Who needs to be involved? |
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