## *Template Guidance*

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| --- | --- | --- | --- | --- | --- |
| *Change Impact Assessment* | *Document detailing the impact of change by team or by category (e.g.Staff, Strategy, etc.)* | | | | |
| ***Use in…*** | *Leading change* | | *Engaging people in change* | | *Delivering change* |
| ***Why would I create this?*** | *We need to have clarity on what will be different to identify all the transition actions needed to move from the current situation to the new world.* | | | | |
| ***What is the content?*** | *A detailed change impact assessment contains the description of the change, the impact of the change across the McKinsey 7S categories, and an assessment of the scale of the change.*  *The change impact assessment is also typically referred to as a Gap Analysis.*  *Current and Proposed documentation are all used as inputs into the change impact assessment.*  *It is useful input into training needs analysis, engagement and communication, and any material which will need to be updated or created to support the change.* | | | | |
| ***Who owns this?*** | *Change Sponsor* | | | | |
| ***Who typically will be responsible?*** | *Business Lead or Business Change Manager or Project Manager (acting as BCM) or Business Analyst* | | | | |
| ***To be created in the change stage…*** | *Design* | | ***To be used in the project stage…*** | | *Design & Plan, Implementation* |
| ***Tips on tailoring*** | | | | | |
| ***Small***  *Create a change impact assessment* | | ***Medium***  *Create a change impact assessment* | | ***Large***  *Create a change impact assessment* | |

The purpose of this document is to provide a simple change impact assessment for a small change which is contained within a single team or function.

*A stakeholder analysis and the Change Checklist are useful inputs and aides into this assessment.*

***When should the change impact assessment be completed?***

*The change impact assessment can be drafted once the initial change brief and the stakeholder analysis is complete.*

*It is recommended that the assessment is not finalised until after the detailed design for the future is complete as this will enable a more accurate and specific gap analysis.*

*If the project is working in an iterative or agile way, the change impact assessment should be done in the project planning and updated during each timebox/increment ahead of a ‘release’ or implementation.*

***Note: If the change has organisational design impacts it is highly recommended that this document is password protected.***

### *What to do after the gap analysis on McKinsey 7S?*

*Consider the transition actions required and create the transition plan (for simple change this may be held within the overall project plan)*

*It is good practice to create a change impact briefing to ensure all parties understand what will change and the scale of the change.*

### *What to do after the gap analysis on stakeholders?*

* *Review the stakeholder analysis and plan – are the stakeholders engaged and on board with the change or are there outstanding actions?*
* *In partnership with the stakeholders, consider any transition actions required and create the transition plan (for simple change this may be held within the overall project plan).*
* *It is good practice to create a change impact briefing to ensure stakeholders will understand what will change for them and the scale of the change.*

***For the rest of the document, text in italics should be replaced with the required content. Please note the examples are illustrative and have fictional data. Complete as much information as possible.***

# Change Impact Assessment

|  |  |
| --- | --- |
| **Faculty, School, Division, Directorate Name** | *The organisation sponsoring the change* |
| **Change Sponsor** | *Name of the individual who will lead and be accountable for the change* |
| **Business Lead or Business Change Manager** | *Name of the individual who will be responsible for delivering the change* |
| **Author** | *Name of the individual writing the document* |
| **Date and Version** | *DD/MM/YY – DRAFT v0.1 (final should be reflected as FINAL v1.0)* |

## 

## Change Summary

Provide a short summary description of the overall change.

|  |  |
| --- | --- |
| **Change Summary** | *For example:*  *The project management processes for the PMO are undergoing review and revision to make simpler and scalable following user feedback*  *For example:*  *A workforce demand management system is required to aide the deployment of lab technicians within the Faculty* |

## McKinsey 7S Impact Assessment

Provide an assessment of the impact using the following criteria:

|  |  |
| --- | --- |
| **High** | Significant impact which will transform the current |
| **Medium** | Substantial impact with some transformation |
| **Low** | Minimal impact with minor changes |
| **None** | No impact |

Refer to the Change Checklist for any assistance with the category headlines.

| **McKinsey 7S Category** | **Impact: (High, Medium, Low, None)** | **What will change?**  **Describe the impact** |
| --- | --- | --- |
| **Structure:**  Organisational hierarchy  Roles & Responsibilities | Low | *For example: The project administrators will report directly to their project managers rather than into the admin function* |
| **Shared Values, Style & Skills:**  Competency Framework  Training | Medium | *For example: The project administrators and PMs will need retraining in the revised processes and templates.*  *Internal L&D courses may require revision.* |
| **Staff:**  People assigned | None | *For example: There will be no recruitment or change in position* |
| **Strategy:**  Strategic vision & plan  Budgets | None | *For example: There is no change to vision, plan or budget. Change falls under Enabling Strategies: Quality People & Quality Services* |
| **Systems (Business Processes):**  Business Processes  Local policies  Local procedures | High | *For example: Major revision of all PM processes and templates including:*  *Project Scoping:*   * *New overall process* * *Updated PM Handbook section* * *Proposal being replaced with BOSSCARRD* * *New Stakeholder analysis template* * *New Privacy by design policy & procedure* * *New Project Resource Profile template* * *Revision to project control procedures (planning, risk, issue, change control, status reporting)* |
| **Systems (Management Information):**  Reports  Tools/Dashboards | Medium | *For example: Status reporting will need to change to align with new KPIs* |
| **Systems (IT):**  Solution Architecture  Solution Design  Security Matrices  Licences  SLAs/Supplier contracts  Upgrade/patch schedule  Data Architecture, Map & Dictionary | Medium | *For example: Existing tools will be utilised* |
| **Systems (Information Governance):**  Document Management System  Data Management System | Medium | *For example: The standard project folder and sub-folders will change. Intranet pages will require updating to reflect new processes and templates available. Project data will be captured and stored differently.* |

## Stakeholders Impact Assessment

Provide an assessment of the impact using the following criteria:

|  |  |
| --- | --- |
| **High** | Significant impact which will transform the current |
| **Medium** | Substantial impact with some transformation |
| **Low** | Minimal impact with minor changes |

Use the existing stakeholder analysis to inform stakeholders to be listed. Stakeholders for whom there is no impact do not need to be listed although it is good practice to show they have also been considered as shown in the final row.

| **Stakeholder(s)** | **Impact: (High, Medium, Low)** | **What will change for this stakeholder?**  **Describe the impact** |
| --- | --- | --- |
| *For example: Staff Learning and Development* | *Medium* | *For example: All Project Management pages on Staff L&D will need to be updated with new process and templates creating work for L&D. PM courses will require revision which needs discussion with the SL&D Partner.* |
| *For example: Project Management Working Group* | *Low* | *For example: Need to be aware of the change in process and templates only.* |
| Others | None | No impact |