

CHANGE MANAGEMENT 101: SCOPING FOR CHANGE

Instigating change is rarely simple, so it is important to conduct a thorough scope before you get started. This can be used to allay any fears that people may have, make the business case for change, plan out necessary steps and test your own knowledge. This template will help you create a scope document.

Using this template

This template provides a framework for you to produce a scope document. Guidelines regarding its use are as follows:

- Some general change, project management and organisational terminology has been used throughout the template. You should change this to reflect the terminology used within your own organisation if it is different.
- Add additional sections to the template if there is more information on your particular change that you would like to include. You may wish, for example, to include information on any known crossovers with other change projects.

What information should the document cover?

The exact information detailed in a scope document can vary between organisations, depending on the elements that change leaders consider important. Generally, it should contain:

- an outline of the business case
- the overall aim/objective
- details on the change project's deliverables
- details of any external dependencies crucial to the successful implementation of the change
- information about the resources required by the change
- a list of the groups affected by the proposed change
- authorisation from concerned parties, where required

An example of each of these, or guidance for completion, is provided on the template in *italic*.

Scoping for Change Template

Change Project	
Change Project Manager	

Details of the Business Case

Outline of the Business Case
<i>This should be a short statement that details the reasons behind the suggested change, the implications of not making the change, and how it is envisaged the change will be implemented. It should also detail the expected costs of implementing the change, and the projected savings as a result (e.g. encouraging home working, where appropriate, to reduce office costs).</i>
Aim/Objective
<i>Detail the overall aim/objective of the change project. This should be a short statement that captures exactly what you want to accomplish through the change (e.g. redistribute work to prevent backlogs in some areas and down time in others, thereby improving customer experience).</i>
Project Deliverables
<i>Detail what will be delivered as a result of the change (e.g. an update to the software system to detail available work hours on a 'live' basis).</i>
External Dependencies
<i>Detail any factors outside of the immediate change initiative that are needed to ensure the success of the project (e.g. IT company to design and build platform to host software).</i>
Required Resources
<i>Detail any resources the change initiative would require (e.g. people, finance, software, hardware, training).</i>

Areas Affected by the Proposed Change

Detail the core areas affected along with a contact for each one. (Generally, this will be the managers of each area, e.g. communication, IT, operations, training etc.)

Area	Contact	Role	Contact Details

Authorisation

Detail the key change sponsors who need to sign off this scope.

Name	Role	Date