Change management process

Submit and receive change requests

Req for change can come from anyone, all are passed to the change requestor (CR)

CR consults colleagues, and decides if change is desirable for user

If there is a need a Request for Change is submitted to change manager (CM). RFC includes:

Description, reasons, benefits and supporting docs

Review and log change requests

CM reviews RFC and decides nature and scope of feasibility / impact analysis

Log request

Determine feasibility of change

Assess change feasibility and impact upon project in terms of time, cost and quality

For small changes this may be informal

Large could take a while and involve several people

Investigate different options and report on: change request, options, costs and benefits, risks and issues, impact, recommendations and plan

A quality review is then done on feasibility study

Change doc collated by CM and submitted to CCB for final review

Study carries a cost, cost is recorded in the change register by the PM. If its an external project the client will have to pay

Approve or reject change requests

Change management process (cont)

Team leaders can approve if no extra costs. PM can approve small changes. CCB larger changes. Very large need an exception report and go to approval by steering committee / project board

Change needs to be recorded and reported

CCB may:	Reject, req more info, approve, approve with conditions, put on hold
CCB:	Needs to consider overall profile. of possible changes. Lots of little changes can have a big effect. Prioritise changes so essential are done first. Delay non-essential until least amount of impact

Approved change need revision to schedule and cost plan

Implement and close change requests

Implement change. Additional testing. Signed off in the change register. Invoices for additional work. Payments.

CM = Change manager
CR = Change requestor
RFC = Request for change

Definition of change

Before you take a baseline the interface designs may change rapidly as designers test with users. No change management needed here

Once decided that ready to start the design needs to be baselined

After baseline rigorous change control required because of potential impact on subsequent phases

Project baselines include (these tend to be interdependent)

- Agreed scope and quality of work
- Agreed schedule
- Agreed cost

Variations on the above include

- Changes of scope. Originates outside project, usually the user changing requirements or by cost or time constraints changing
- Development changes. Originates within the project and includes routine changes during developing and refining a product
- Faults. Originates within, caused by team making an error

Discretion can be exercised for accepting scope and dev changes, but error changes are obligatory

Cheatography

Project change control and management Cheat Sheet
by Natalie Moore (NatalieMoore) via cheatography.com/19119/cs/2252/

Configuration management

Lots of docs in a project, so you need a central project library where project master copies are stored, with version numbers

To do this you need a project config librarian

Make sure all project products are controlled

Config management elements

Config item ID: Items subject to the config management system need to be identified

Docs include:	Baseline specs, Design docs, Software components, Operational and support doc, Key planning docs (budgets, schedules), Maybe also IT equipment

All items defined as config items and details will be recorded in config management database. Details:

CI ref #, Current status, Version #, Any larger configs for which it is a part, Components it has, Other products it is derived from,

Config status accounting	After a change to CI agreed, project librarian sets status of CI accordingly and Maintains continual record of statuses of items that make up the system

Configuration management (cont)

Config control	The librarian reviews to make sure no problems with statuses

CI = Configuration item ID

Change management roles and responsibilities

Project manager

Oversees process

Limited responsibility

Ensures Requests For Change (RFC) are handled appropriately

Usually also the change manager

Have user reps agree to changes to requirements

Control scope. Aware additional features increase costs. Adjusts contract as required

Change requestor

Recognises need for change

Formally requests change via RFC

Change manager

Often project manager

Lodges RFC in the change register

Decides whether feasibility study required for change

Appoints feasibility group

Change feasibility group

If you use project team members here you may further delay the project

Investigates feasibility of req change

Research how to implement

Change management roles and responsibilities (cont)

Research costs, benefits and impact of options

Document findings in a feasibility study report

Change control board

Decides whether to accept or reject the RFC

Resolves change conflict where changes overlap

Resolves problems caused by change

Approves change implementation timetable

Change implementation group

Carries out the change

Usually the project team

Change mgmt: major concern

Impacts on staff levels, skill retention, and responsibilities

Procedures for managing change should be established at the beginning of project

Need to keep track of changes to systems

Change control system needs to be devised and implemented, especially if outside contractors are doing the work

Allowances need to be made in project for any additional work needed due to changes