

Chapter 5: Planning



If initiation is where a project is born, planning is where it gets legs. Teams are formed, tasks get scoped, timelines take shape, and everyone starts mapping out how to get from Point A to Point B. This is usually where the project manager shines by putting structure around the chaos.

But here's what most people miss: this is also the most powerful moment to bake *people-readiness* into the work rather than try to bolt it on later.

Why People-Readiness Needs to Be Baked In

Think of it like building a house. If you wait until the framing is done to ask where the electrical outlets should go, you're going to have to tear into a lot of walls. Same thing here. If you don't account for how the change will affect people until after the schedule is locked, training will feel rushed, communications will feel reactive, and resistance will feel personal.

But if you plan for it early, everything else becomes easier. You know who's impacted, what they need, and when to help them get there.

Training Isn't Enough

The Change Manager got pulled into a project late in the game. The system was launching in two weeks. The project team asked her to "do some quick training."

She asked what users already knew about the system. "Nothing," they said.

She asked if they understood why, it was being rolled out. "Not really," they said.

She asked if managers were ready to support the change. Silence.

It clearly wasn't a training issue; it was a planning issue, and no "quick" training session was going to fix it.

What OCM Planning Actually Looks Like

When you bring OCM into project planning, you're not adding fluff. You're adding structure for how people will successfully move through the change. Here's what that includes:

- Stakeholder analysis. Not just who approves the work, but who's affected by it and what their concerns might be.
- Change impact assessment. What exactly is changing for each group? What's the gap between today and the future state?
- Communication plan. Who needs to know what, when, and in what format?
- Training plan. Not just "what buttons do I push," but "what's changing and why does it matter?"
- Resistance management. How will you listen for concerns and respond in real time?

All of that should be mapped to the same timeline and milestones as the project itself. One plan, not two.

The Shared Plan

On a major customer service transformation, the Project Manager and Change Manager sat down early and built a fully integrated plan. Every milestone had a technical deliverable and a change milestone side-by-side.

It wasn't fancy. Just a shared Excel sheet with columns for both. But that small move got everyone aligned and made sure nothing was forgotten.



Pro Tips

Plan for communication like you plan for testing. It's not a nice-to-have. It's critical infrastructure.

Map the change by role, not just by org chart. People experience change through their tasks, not their titles.

Don't overthink "resistance." It's just feedback. Treat it like data, not defiance.

Appendix B includes a planning checklist that helps align delivery and adoption activities from day one.