Change Impact Assessment Template

Purpose: This tool helps you get clear on *who* is affected by a change, *how* they're affected, and *what* support they'll need. It's a practical starting point for shaping communications, training, and stakeholder engagement.

Template: Change Impact Assessment

Group or Role	What's Changing	Impact Level (L/M/H)	What They Need	Owner
Example: Customer Service Reps	New CRM system replaces 3 legacy tools	High	Hands-on training, job aids, early preview	Training Lead
Example: Frontline Managers	New process for tracking KPIs	Medium	Talking points, Q&A session, dashboard overview	Change Lead
Example: Finance Team	Updated approval workflow	Low	Email announcement, quick-reference guide	Project Analyst

How to Use It

1. **List all groups or roles that will be affected by the change.** Think beyond the org chart - who does the work?
2. **Describe what's changing for them.** Focus on tasks, behaviors, or processes they'll need to do differently.
3. **Rate the level of impact.** Not all changes are equal. A high impact change usually means new skills, big workflow shifts, or major visibility.
4. **List what they'll need.** Think training, communication, job aids, leadership support—whatever helps them navigate the change.
5. **Assign ownership.** Every action needs someone accountable for making it happen.

Pro Tips

Don't assume a change is "low impact" just because it seems simple. Always talk to the people doing the work.

Use this document as a living tool. Revisit it after pilots or feedback sessions to update needs.

Share it with your project manager—this is gold for task planning, stakeholder updates, and risk mitigation.