

Integrated Project/OCM Planning Checklist

Purpose: This checklist helps you embed change management actions directly into the project lifecycle. Use it to ensure your plan accounts for the *people* work alongside the *technical* work—so adoption happens by design, not by accident.

Initiation Phase

- Has the **project sponsor** been briefed on their role as a change leader?
- Have we clearly defined the “**why**” behind the project from a people perspective?
- Have we identified the **primary groups or roles** affected by the change?
- Has a **change lead or OCM resource** been assigned from Day 1?
- Have we documented any known risks or resistance areas?

Planning Phase

- Is there a **shared project + change management timeline**?
- Have we completed a **change impact assessment**?
- Has a **stakeholder map** been created and validated?
- Are **communications, training, and resistance plans** built into the project plan?
- Are we planning **previews/pilots** for key audiences before go-live?

Execution Phase

- Are we delivering **communications on time** and using the right channels?
- Is **training** hands-on, timely, and tailored to different audiences?
- Have we briefed **people managers** so they can lead conversations with their teams?
- Are we tracking **early adoption signals** and not just deliverables?
- Do we have **support resources** and escalation plans in place?

Closing Phase

- Are we measuring **adoption and behavior change**, not just completion?
- Have we planned **post-launch support** (office hours, floor walkers, Q&A)?
- Are we capturing **lessons learned** on both the technical and people side?
- Have we recognized **change champions** and celebrated progress?

Sustainment Phase

- Are **performance measures** aligned with the new way of working?
- Is there a plan for **ongoing reinforcement** (coaching, refresher training, recognition)?
- Have **job aids, SOPs, and documentation** been updated?
- Is there a clear **owner for sustainment** activities beyond the project?



Pro Tips

Don't assume your PM or change lead will "just know" what to cover. Walk through this checklist together.

Use this as a project health check during team meetings. It'll surface gaps before they become problems.

Color-code it if you want—green for done, yellow for in progress, red for missing.