Introduction to Project Management (PM101)
Section 10 – Change Management

Workbook
Change Management
Change Management
Keys to Managing Change:

- Don't fight it.
- Focus on communicating impacts to the appropriate parties.
- Have a clearly defined & approved change management process.
- Each change must be traceable to the WBS.
- All affected parties are notified of baseline changes and accept them.
Change Management
Scope Change Management

- Who can initiate a change?
- How is the request documented?
- How are the impacts measured?
- Who approves the change & accepts the impacts?
- Have you followed your own process? Change Review Board (CRB)?
Change Management
Change Request Form

- Date of request & name of requestor.
- Define & justify the change.
- Estimated time & cost to complete.
- Estimated technical impacts.
- Estimated overall project impact.
- Signed authorization for change!!!

Use a Database!
Change Management

Action Items or Issues

- Action items should be recorded.
- Database systems are best for this purpose.
- Track solutions as well as challenges.
- Track closure rates:
  - Early in a project there are likely more new items than closed items.
  - If this trend continues reevaluate the project plan.
Questions and Answers
Review Questions:

1. All of the following are keys to successfully managing scope change EXCEPT:
   A. Focus on communicating the impacts
   B. Each change must be traceable to the WBS
   C. Upper management approves all scope change
   D. Manage change, do not attempt to prevent it

2. Which of the following is NOT a key question for the scope change management process?
   A. Who can initiate change?
   B. Who approved your process?
   C. How are change requests documented?
   D. Have you followed your own process?

3. Which of the following items are part of a complete change request form?
   A. Date of request and name of requestor
   B. Estimated technical impacts
   C. Signed authorization for change
   D. All of the above

4. Which of the following is a general rule for managing issues?
   A. All issues must be approved
   B. A database system or spreadsheet work best for managing issues
   C. It is more important to track the issues than closure rates
   D. It is important to track closure rates
Answer Key:

1. C
   Upper management approval is not a key to successfully managing scope change.

2. B
   "Who approved your process" is not a key question for the scope change management process.

3. D
   All of the above choices are part of a complete change request form.

4. D
   Tracking closure rates is one of the general rules for managing issues.