

Operating Plan/Change Management: (Program Name)

This document outlines the operating plans for the new “???” , which will facilitate the **??? Program Operations/Changes**. *TIPS: Remember to use the simplest words possible to make your plan clear and easy to understand by anyone with limited time. And detailed areas (oftentimes procedures) should be put “below the line” (in tabs on later pages), so the plan stays focused. Avoid the common mistake of pulling solutions into the early sections (problem, opportunity, etc.)*

Problem:

Here is the problem (or are the problems) we really need to solve.

Opportunity:

This context or situation is why we can solve the problem now.

Solution:

We are developing the ??? Program. By having the right systems in place, we will provide these impacts ...

Challenges:

No meaningful solution comes easy. These are the challenges we'll have to tolerate or overcome to provide the Solution above.

Inputs and Outputs:

To ensure stakeholders know what our program does is clear and to help drive alignment with stakeholders, here are our inputs and outputs. *Below are a couple of starting samples – pick one or write your own:*

Product Teams: We take in information about our user problems and we output software features or groups of features to improve user workflows. We track these in our Product backlog.

Project teams: We take in paid customer projects and provide a variety of different solutions from software ports to new platforms, optimizations of customer projects, bug fixes, etc. We track these in our Project backlog.

Operations:

This is a change management effort. As such, our work is framed around the changes needed to all our systems and resources to reach the new norms desired above. Those are changes to Comms, People, Tooling, & Processes. *Listed in each section are common things that may or may not be something you need to consider. Delete what you don't think applies; add what you do.*

People

Each group below will need a Point of Contact to help shape or inform the program. The POC is either the head of that department or delegates.

- Internal Team:
 - Name
 - .
- External Teams:
 - Partner Team A:
 - .
 - Partner Team B:
 - .

Tools

- Internal and External: Program Infrastructure:
 - Examples: Slack, Jira, Confluence, Google Drive, etc.
- Internal: Project Tools & Reports:
 - Intake tracker for Projects (if needed)
 - Trackers /Dashboards for Projects (if needed) from intake to completion
 - Any databases & schemas needed
 - Feedback Forms for improving each project team's workflows better
- External: Program Status Reports:
 - Program Roadmap/Timeline
 - Help/Support Request Form
 - Pipeline Suggestion Form
 - Program Health Report (RAG style) (include risks)
 - Tracking Adoption of systems and training above
 - Feedback forms for making the program better

Processes

NOTE:

- *This OP should be super light, like a “one-pager” so that readers can get through it quickly.*
- *Detailed plans should be in a separate section or likely linked to other files.*
- *If you need to make diagrams they would go in the additional section as well.*
- *List what internal versions of the items below you will need to coordinate your team's internal work and then list what external versions you will need to*
- *List any that you want to make that will help you map the tools and operations, flow of data, flow of items between people, etc.*

- Internal:
 - Meetings:
 -
 - Tool Operations:
 - Processes for product ideation, design, review, approvals, etc.
 - Processes/Checklists for Project Tracking (kickoff, onboarding, reviews, approvals, closeout, post mortem, etc.)
 - Diagrams:
 -
- External:
 - Meetings:
 -

- Tool Operations:
 - .
- Diagrams:
 -

Communications

Below are our communication plans:

- Internal:
 - Q&A decks, values, etc. explaining why and when we are transitioning
 - Training:
 - Onboarding for:
 - (list all stakeholders)
 - Tools:
 - (you can also list this in the Tools section, if preferred)
 - Processes:
 - (you can also list this in the Processes section, if preferred)
- External:
 - Announcements before during and after any changes
 - Wins slides

Early Plans:

Here are some of the immediate activities and details:

- Short Term Program Goals:
 - .
- Knowledge Gathering:
 - .
- Consensus Building:
 - .
- Operations:
 - Backlog Development for coordination
 - Meeting series with founding stakeholders