

**The  
International  
Organizational Change  
Management Institute**



**TITLE:**

The International Standards for Organizational Change Management.

Version 2015

**Drafted Using ISO Standards Formatting**

**Released 15 July, 2015 by the IOCMI Board of Directors.**

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## 1. INTRODUCTION

- 1.1. The International Organizational Change Management Institute (IOCMI) started in 2011 with the following Mission and Vision:
  - 1.1.1. **IOCMI Mission:** *To achieve international standards of Organizational Change Management principles and practices.*
  - 1.1.2. **IOCMI Vision:** *To obtain support for the process of achieving international standards of Organizational Change Management principles and practices.*
- 1.2. Organizational Change Management (OCM) should not be confused with Change Management (CM). Where CM focuses on the cognitive aspects of behavioural change, it may be considered as people-resistance and adoption oriented. OCM's process begins in the process of Strategy with Strategic Change Planning, and is more impact-centric, where every impact is identified as a benefit or loss, and managed accordingly, and will likely involve CM in many impacts. Many impacts that are physical in nature, for example: transition from cell-mobile to wi-fi calling will not require CM but will require a physical technology device change, as part of impact management.
- 1.3. The standards herein were agreed and finalised by the IOCMI's Board of Advisors (iocmi.org) and released by the IOCMI's Board of Directors respectively (iocmi.com).

## 2. SCOPE

- 2.1. This standards document specifies inter alia, the Taxonomy for Organizational Change Management (OCM) including the Definition for OCM, OCM Strategies, Principles, Practices, Roles and Competencies required to manage Organizational Change.

## 3. NORMATIVE REFERENCES

- 3.1. Organizational Management theory is academically accepted to have been formed on the foundation of work by Taylor, Fayol, Mintzberg, et. al.
- 3.2. The four functions of management from this foundational work are, Planning, Leading, Organizing and Controlling or PLOC and as such are used as the basis for the OCM standards considered herein. This foundational management theory, is implied in the same terms wherever the word 'Management' is used.
- 3.3. Strategy Maps and Performance Management, as introduced by Kaplan and Norton are considered the prevailing theoretical strategic models.
- 3.4. Quality management as per Deming's 'Plan-Do-Study-Act' is expected as part of any organization's Quality Policies. For the sake of OCM Processes, it is seen as the relationship between Organizing and Controlling functions of management.

**Section 4 - 'Normative Clauses' are the OCM prevailing international standards as prescribed by the IOCMI.**

**Section 5 - 'Informative Clauses' are considered as recommendations and information purposes only, supporting the standards in the Normative Clauses section.**

#### 4. **NORMATIVE CLAUSES**

These clauses describe what shall be implemented for Organizational Change Management.

1. Definition of Organizational Change Management
  - a. The definition of Organizational Change Management shall be "The Planning, Leading, Organizing and Controlling of Strategic Change."
2. The two OCM Strategies shall be TRANSCENDENCE and TRANSITION, respectively.
3. The principles of OCM shall be:
  - a. Change Leadership Management\*;
  - b. Change Nexus Management\*;
  - c. Change Impact Management\*;
  - d. Change Communications Management\*;
  - e. Education and Training Management\*.

\*Where management means 'Planning, Leading, Organizing and Controlling'.

4. OCM practices shall be:
  - a. Planning Change;
  - b. Leading Change;
  - c. Organizing Change;
  - d. Controlling Change.
5. The following roles shall be required for OCM:
  - a. Change Leadership Management Role;
  - b. Change Nexus Management Role;
  - c. Change Impact Management Role;
  - d. Change Communications Management Role;
  - e. Impact Education and Training Management Role.
6. The competencies for these roles shall be as follows:
  - a. Change Leadership Management Role: Manages the change leadership process, stakeholder analysis, governance, reporting and leadership engagement activities.
  - b. Change Nexus Management Role: Enables the nexus process of mapping change leadership, stakeholders, change impacts, and change activities with the associated stakeholders through technologically enabling systematic analysis and corresponding activities for the management of impacts, communications and, education and training.
  - c. Change Impact Management Role: Manages the Process of identifying impacts on environment, people, processes and systems in order to transition to a new state of operating.
  - d. Change Communications Management Role: Manages the 'Push, Pull, Profile' communications process required to inform, manage perceptions, identify and manage risk in order to obtain alignment to the change and feedback change risks and issues to the change leadership.
  - e. Impact Education and Training Management Role: Manage the education and training process required to prepare stakeholders for the impact of the change.

## 5. INFORMATIVE CLAUSES

5.1. In reference to Clause 1, OCM Definition.

5.1.1. The definition of OCM, is underpinned by organizational management theory, which is based on the four functions of management being, Planning, Leading, Organizing, Controlling..

5.1.2. Where 'Strategy' is understood to drive the organization's need for change, which can be at the highest strategic level, or wherever a business unit undertakes SWOT analysis and strategic planning at for example, an operational level.

5.2. In reference to Clause 2, OCM Strategies.

5.2.1. **TRANSCENDENCE** by Merriam-Webster (Accessed 7 July, 2015) definition has two categories of definition for TRANSCEND as both a **transitive** and **intransitive** verb. As a **transitive** verb and in the context of OCM, the following definitions apply:

5.2.1.1. a : to rise above or go beyond the limits of (IOCFI Eg: Rise above existing primitive operating model and technology.)

5.2.1.2. b : to triumph over the negative or restrictive aspects of (IOCFI Eg: Implement a business methodology which overcomes the need for fossil-fuels.)

5.2.1.3. c : to be prior to, beyond, and above (the universe or material existence) (IOCFI Eg: Society expect organizations to go beyond its material existence for example, 'maximising shareholder value' (Porter, circa 1990's), and recognize social and environmental responsibilities.)

As an **intransitive** verb and in the context of OCM, the following definitions apply:

5.2.1.4. to rise above or extend notably beyond ordinary limits (IOCFI Eg: Breaking new ground in relation to competitors, creating LEGITIMATE competitive advantage.)

5.2.2. **TRANSITION** by Merriam-Webster (Accessed 7 July, 2015) definition applies.

5.2.2.1. a : passage from one state, stage, subject, or place to another (IOCFI Eg: From one state of operating to another, eg: onsite computing to cloud computing OR real world marketing to social network marketing.)

5.2.2.2. b : a movement, development, or evolution from one form, stage, or style to another (IOCFI Eg: To develop a sustainability principled product)

5.2.3. These two OCM Strategies are co-dependent, in that, in order to transcend, a certain amount of transition may be required. Likewise, a transition to, for example a new computing system, may require transcending current thinking around data-processing.

- 5.3. OCM Principles are derived from the activities required to be managed in order to effect organizational change, which aims to, amongst other things, for example, achieve organizational readiness.
- 5.3.1. **Change Leadership Management** is required to correctly identify the respective leader of a change requirement, and then managing this leader to ensure full and proper organizational change. This shall be done in a manner that is supportive and consultative. A coaching style may work in some cases.
- 5.3.2. **Change Nexus Management** is the key to ensuring that all aspects of OCM are linked completely and correctly, systematically enabling all the OCM processes via an OCM tool, which could be a set of linked spreadsheets, a custom development or a range of products. The Change Nexus can be described as the integration point of all aspects of Change, being inter alia, Strategy, Stakeholders, Impacts, Communications, Education, Training and governance are adequately managed and efficiently processed.
- 5.3.3. **Change Impact Management** ensures that all participating stakeholders have an opportunity and exercise their responsibility to pro-actively understand impacts on environment, society, customers, the organization, and the individual. Correctly identifying the OCM alignment, adoption and leveraging activities using Communications, Education and Training are key to cascading Impact response to the respective roles.
- 5.3.4. **Change Communications Management** relates to the activity of Stakeholder Marketing, Stakeholder Public Relations whether it's pushing communications, profiling using surveys etc, and then mitigating risks via further push/pull or providing communications via the respective governance channels, depends on the context of the organization and the respective change. All Impacts identified, need to be considered for Change Communications requirements.
- 5.3.5. **Impact Education and Training Management** relates to understanding the education needs per impact, and developing a respective strategy, plan, schedule and execution of education activities. Where impacts require training, the same applies.
- 5.3.6. **NOTE 1:** These roles are not interchangeable. Each role has very specific set of responsibilities. It is strongly advised to have at least one person fulfilling each role in order for all aspects of OCM to be undertaken completely and correctly.
- 5.3.7. **NOTE 2:** As a functional OCM team, the above roles should be overseen by a competent OCM Manager, who understands strategy, planning, business operating models, system and enterprise architecture, corporate culture, leadership, organizational development (learning). The executive title "Director of Organizational Change" will have oversight of all OCM Managers.
- 5.3.8. **NOTE 3:** Where existing Training or Communications Management exists within for example, the HR Department, or Marketing department, the respective resources should be integrated into the process, in order to ensure quality of service delivery.
- 5.3.9. **NOTE 4:** These roles will work with 'Change Agents' within the impacted stakeholder groups, as functional streams, integrated horizontally, per impact, where required.

- 5.4. For further information on competencies, general competencies definitions can be applied for those provided, per role. Otherwise please consider the IOCFMI competency definitions on [www.iocfmi.org](http://www.iocfmi.org).
- 5.5. OCM<sup>∞</sup> : OCM Infinity Table for Strategic Change Analysis and Planning

<b>OCM<sup>∞</sup> : Strategic Change Analysis and Planning</b>	
(NOTE 1: Change Order planning and release configuration recommendation can be found on <a href="http://iocfmi.com">iocfmi.com</a> ) (NOTE 2: Change Orders should include Key Stakeholder Approval before Delegation of Authority initiates for Change Order release.) (NOTE 3: IOCFMI.com has further information on Delegation of Authority Policy recommendations for Change Orders.)	
<b>Long Term Strategy Management</b>	<ul style="list-style-type: none"> <li>&gt;Identify long-term changes required to achieve long-term strategic objectives</li> <li>&gt;Identify Key Stakeholders</li> <li>&gt;Person requiring Change, to Initiate Internal governance for Change Order planning and if accepted, the respective release, obtaining Key Stakeholder acceptance, then following corporate 'Delegation of Approval' policies,</li> <li>&gt;Upon release, incorporate into current Annual Change Agenda if necessary.</li> <li>&gt;Respective Approving Managers to approve released Change Order for Current Annual Agenda Release governance</li> <li>&gt;On release of Change Order, initiator is accountable as Change Lead.</li> </ul>
<b>Medium Term Strategy Management</b>	<ul style="list-style-type: none"> <li>&gt;Identify medium-term changes required to achieve medium-term strategic objectives.</li> <li>&gt;Initiate internal governance for Change Order release, following corporate 'Delegation of Approval' policies,</li> <li>&gt;Schedule Change into current Annual Change Agenda if necessary.</li> <li>&gt;Release Change for Current Annual Change Agenda Release Governance</li> </ul>
<b>Short Term Strategy Management</b>	<ul style="list-style-type: none"> <li>&gt;Identify short term changes required to achieve short term strategic objectives</li> <li>&gt;Initiate internal governance for Change Order release, following corporate 'Delegation of Approval' policies,</li> <li>&gt;Release Change for Current Annual Change Agenda</li> </ul>
<b>Annual Strategic Change Agenda Management</b>	<ul style="list-style-type: none"> <li>&gt;Ensure all changes required have a released Change Order that has followed due process of correct and complete capturing of information.</li> <li>&gt;Ensure all Change Orders have been correctly released, or where rejected have been communicated to Change Order originator.</li> <li>&gt;Prepare Current Annual Change Agenda for Delegation of Authority release process.</li> <li>&gt;Manage Change Agenda release governance</li> <li>&gt;Release Change Agenda</li> </ul>
<b>Organizational Change Management Initiative Groups</b>	<ul style="list-style-type: none"> <li>&gt;Group Change Orders using logical grouping approach.</li> <li>&gt;Facilitate released Change Order Grouping</li> <li>&gt;Review and confirm released Change Order 'Due Dates', ito of feasibility given operational capacity and key corporate calendar dates.</li> <li>&gt;Where required amend Change Order, to include extra resources, 'Due Date' changes or other material changes to the Change Order.</li> <li>&gt;Amendments to Change Order and Change Agenda need to be cycled through correct governance.</li> </ul>
<b>Individual OCM Initiative</b>	<ul style="list-style-type: none"> <li>&gt;Integrate Change Orders where practical.</li> <li>&gt;Approve Change Order grouping</li> <li>&gt;Formally Identify Stakeholder groups and respective Key Stakeholders, load into OCM System.</li> <li>&gt;Conduct Stakeholder Analysis, load into OCM System.</li> <li>&gt;Distribute Released Change Order to respective Key Stakeholders and identified Stakeholders.</li> <li>&gt;Sign-off on Change Initiation Governance and Stakeholder Communications.</li> <li>&gt;Draft OCM parent plan, based on timeframe released, with placeholders for the plans as per OCMx Table.</li> </ul>
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## 5.6. OCMx : OCM Phases, Roles, and Functions.

OCMx : Organizational Change Management Roles and Functions				
PHASES >>	EMPOWER		ENABLE	
	PRACTICES / FUNCTIONS			
PRINCIPLE / ROLE	Change Planning	Leading Change	Organizing Change	Controlling Change
Change Leadership Management*;	<ul style="list-style-type: none"> <li>&gt;Plan Change Leadership Management</li> </ul>	<ul style="list-style-type: none"> <li>&gt;Approve Change Leadership Management Plan</li> <li>&gt;Identify Senior Change Team, led by Change Lead</li> <li>&gt;Contract with respective Senior Change Team Leaders</li> <li>&gt;Schedule 1-on-1 preparation sessions with respective Change Leaders</li> <li>&gt;Promote Change Agent participation</li> <li>&gt;On-board respective Change Agents</li> <li>&gt;Contract with respective Change Agents</li> <li>&gt;Kick-off Respective Streams at impacted sites and with impacted stakeholder groups.</li> </ul>	<ul style="list-style-type: none"> <li>&gt;Schedule fortnightly meetings with Change Lead</li> <li>&gt;At meetings, analyse escalated potential and existing Change problems</li> <li>&gt;At meetings, analyse escalated Opportunities and Threats</li> <li>&gt;Discuss and agree actions</li> <li>&gt;Schedule Weekly meetings with Senior Change Team Leads</li> <li>&gt;At meetings, analyse escalated potential and existing Change problems</li> <li>&gt;At meetings, analyse escalated Opportunities and Threats</li> <li>&gt;Discuss and agree actions</li> <li>&gt;Implement Remediation activities, as required</li> <li>&gt;Work to close all items on 'Change Leadership Management Project Plan'</li> <li>&gt;Upon Completion of 'Change Leadership Management' activities, mark 'Change Leadership Management' line item on Change Order as complete.</li> </ul>	<ul style="list-style-type: none"> <li>&gt;Integrate Change Leaders with Executive Change Team for governance meetings</li> <li>&gt;Agree Meeting attendance measures</li> <li>&gt;Agree measures for completeness, quality, audit and compliance</li> <li>&gt;Monitor Leadership Performance</li> <li>&gt;Develop remediation activities, where required</li> <li>&gt;Monitor Change Order line item 'Change Leadership Management' for completeness</li> </ul>
Change Nexus Management*;	<ul style="list-style-type: none"> <li>&gt;Plan Change Nexus Management</li> </ul>	<ul style="list-style-type: none"> <li>&gt;Approve Nexus Management Plan</li> <li>&gt;Prepare systematic approach for Change Nexus management</li> <li>&gt;Roll-out system to impacted stakeholders</li> </ul>	<ul style="list-style-type: none"> <li>&gt;Develop Change Scope List</li> <li>&gt;Link Scope List to Strategic Initiatives</li> <li>&gt;Maintain Centralised Stakeholder Group List</li> <li>&gt;Maintain Stakeholder Database</li> <li>&gt;Link Stakeholder Groups to Change Scope Items</li> <li>&gt;Maintain all system configuration data to ensure quality reporting of Nexus Status</li> <li>&gt;Ensure consistency of integration across all change activities</li> <li>&gt;Work to close all items on 'Change Nexus Management' Project Plan</li> <li>&gt;Upon Completion of Leadership Management activities, mark 'Change Nexus Management' line item on Change Order as complete.</li> </ul>	<ul style="list-style-type: none"> <li>&gt;Monitoring of inter alia, quality of Impact data, Report Quality, system usability and experience, integrity and robustness of system process, correct maintenance of master data and system configurations.</li> <li>&gt;Change Agent delegation, Stakeholder Engagement, Activities required/Completed, Change Problems reported, Issues, Risks.</li> <li>&gt;Complete compliance, quality and audit report.</li> <li>&gt;Complete Change Impact Management</li> <li>&gt;Ensure all reporting and analysis tools are working</li> <li>&gt;Monitor Change Order line item 'Change Nexus Management' for completeness.</li> </ul>
Change Impact Management*;	<ul style="list-style-type: none"> <li>&gt;Plan Change Impact Management</li> </ul>	<ul style="list-style-type: none"> <li>&gt;Approve Impact Management Plan</li> <li>&gt;Identify respective stream lead</li> <li>&gt;Contract with Stream Lead</li> <li>&gt;Identify respective Change Agents</li> <li>&gt;Contract respective Change Agents</li> <li>&gt;Kick-off respective Change Stream at impacted sites and stakeholder groups</li> </ul>	<ul style="list-style-type: none"> <li>&gt;Identify Impacts, link to Scope List</li> <li>&gt;Assess Impacts for physical transition, alignment, adoption, communication, education and training requirements</li> <li>&gt;Undertake physical transition</li> <li>&gt;Work with other OCM streams for Communications, Education and Training</li> <li>&gt;Correct performance of stream where needed from Controlling feedback</li> <li>&gt;Complete all critical Impact activities before transition completes</li> <li>&gt;Complete all non-critical Impact activities as and when possible, before or after transition completes</li> <li>&gt;Work to close all items on 'Change Impact Management' Project Plan</li> <li>&gt;Upon Completion of 'Change Impact Management' activities, mark 'Change Impact Management' line item on Change Order as complete.</li> </ul>	<ul style="list-style-type: none"> <li>&gt;Monitoring of inter alia, number of Impacts reported, analysed, Change Agent delegation, Stakeholder Engagement, Activities required/Completed, Change Problems reported, Issues, Risks.</li> <li>&gt;Complete compliance, quality and audit report.</li> <li>&gt;Monitor Change Order line item 'Change Impact Management' for completeness.</li> </ul>
Change Communications Management*;	<ul style="list-style-type: none"> <li>&gt;Plan Change Communications Management</li> </ul>	<ul style="list-style-type: none"> <li>&gt;Approve Change Communications Management Plan</li> <li>&gt;Identify respective stream lead</li> <li>&gt;Contract with Stream Lead</li> <li>&gt;Identify respective Change Agents</li> <li>&gt;Contract respective Change Agents</li> <li>&gt;Kick-off respective Change Stream at impacted sites and stakeholder groups</li> </ul>	<ul style="list-style-type: none"> <li>&gt;Identify impacts where Change Communications are required</li> <li>&gt;Assess Impacts where Change communications are required</li> <li>&gt;Utilizing 'Best Practice' Change Management approaches, determine communications plan per Impact requirement</li> <li>&gt;Work with other OCM streams for better Communications integration</li> <li>&gt;Correct performance of stream where needed from Controlling feedback</li> <li>&gt;Complete all critical Impact activities before transition completes</li> <li>&gt;Complete all non-critical Impact communication activities as and when possible, before or after transition completes</li> <li>&gt;Work to close all items on 'Change Communications Management' Project Plan</li> <li>&gt;Upon Completion of 'Change Communications Management' activities, mark 'Change Communications Management' line item on Change Order as complete.</li> </ul>	<ul style="list-style-type: none"> <li>&gt;Monitoring of inter alia, all communications required, ownership and delegation of communications activities, support from internal communications department, progress of communications etc.</li> <li>&gt;Complete compliance, quality and audit report.</li> <li>&gt;Complete Change Communications Management</li> </ul>
Impact Education and Training Management*.	<ul style="list-style-type: none"> <li>&gt;Plan Education and Training Management</li> </ul>	<ul style="list-style-type: none"> <li>&gt;Approve Education and Training Management Plan</li> <li>&gt;Identify respective stream lead</li> <li>&gt;Contract with Stream Lead</li> <li>&gt;Identify respective Change Agents</li> <li>&gt;Contract respective Change Agents</li> <li>&gt;Kick-off respective Change Stream at impacted sites and stakeholder groups</li> </ul>	<ul style="list-style-type: none"> <li>&gt;Identify impacts where impact education and training are required</li> <li>&gt;Assess Impacts where impact education and training are required</li> <li>&gt;Utilizing 'Best Practice' education and training approaches, determine approach, plans and schedules per Impact requirement</li> <li>&gt;Work with other OCM streams for better education and training integration</li> <li>&gt;Correct performance of stream where needed from Controlling feedback</li> <li>&gt;Complete all critical 'Impact Education and Training' activities before transition completes</li> <li>&gt;Complete all non-critical Impact communication activities as and when possible, before or after transition completes</li> <li>&gt;Work to close all items on 'Impact Education and Training Management' Project Plan</li> <li>&gt;Upon Completion of 'Impact Education and Training Management' activities, mark 'Impact Education and Training Management' line item on Change Order as complete.</li> </ul>	<ul style="list-style-type: none"> <li>&gt;Complete compliance, quality and audit report.</li> <li>&gt;Complete Change Education and Training Management</li> </ul>

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