How to Manage Change Requests and Stay in Control



Make change a controlled decision

A good process lets the project adapt while keeping commitments understandable.

Define the purpose

Capture proposed changes to the authorised basis, assess their effects and obtain the appropriate decision before implementation. Use a proportionate process that fits the delivery approach.

Onboarding case

A team is introducing a staff-onboarding workflow. A request to add another language may improve usability but also affects configuration, verification and guidance.

Use the control room

Follow one request from its need through evaluation, authority, implementation and closure. The useful result is an informed commitment.

TAKE IT TO YOUR PROJECT

Name the current baseline or commitment the proposed change affects.

Establish the decision rules

People should know which changes they can decide and when to escalate.

Define the authority

Agree approval thresholds, decision owners, required evidence, emergency routes and record keeping. Distinguish a request from an authorised instruction.

Onboarding case

In the illustrative governance, PM may approve eligible changes up to $1,000. A request estimated at $1,800 needs the sponsor's decision, along with other relevant conditions.

Keep rules accessible

Connect the change process with scope, supplier commitments, product priorities and operating responsibilities. A local workflow should not override formal authority.

TAKE IT TO YOUR PROJECT

Write the approval route for one likely request.

Capture the need before the solution

The request should explain the problem and the result it seeks.

Use a simple record

Record ID, requester role, date, reason, desired outcome, affected requirement, timing need, expected value and current status. Avoid assuming every proposed design is required.

Onboarding case

CR-05 asks for another language because a group of new staff struggle with the instructions. The team can evaluate translation, clearer content or another support route.

Check completeness

Ask for representative examples and the consequence of doing nothing. That information helps compare options and decide the right amount of analysis.

TAKE IT TO YOUR PROJECT

Write the underlying need in one sentence.

Log and acknowledge the request

A shared record makes ownership and current state visible.

Use clear statuses

Capture, screening, analysis, awaiting decision, approved, rejected, deferred, implementing and closed are possible states. Tailor the workflow and define what each state means.

Onboarding case

CR-05 is recorded with an analysis owner and decision date. The requester knows when to expect a response and which evidence is needed.

Avoid hidden work

A request mentioned in a meeting should not quietly become implementation. Keep the route understandable to both the requester and the delivery team.

TAKE IT TO YOUR PROJECT

Create a log entry with owner, state and next date.

Screen the request

Early checks prevent unnecessary analysis and reveal urgent decisions.

Ask the first questions

Is it a real scope change, a clarification, a defect or work already included? Is it relevant to the objective? Who has authority and when is the decision useful?

Onboarding case

The original scope promised one language, so CR-05 changes the commitment. A correction to an already required validation message may instead be a defect or clarification.

Choose the next step

Reject an unsuitable request through the proper route, clarify missing information or authorise proportionate impact analysis. Record the reason.

TAKE IT TO YOUR PROJECT

Classify a request before choosing its analysis path.

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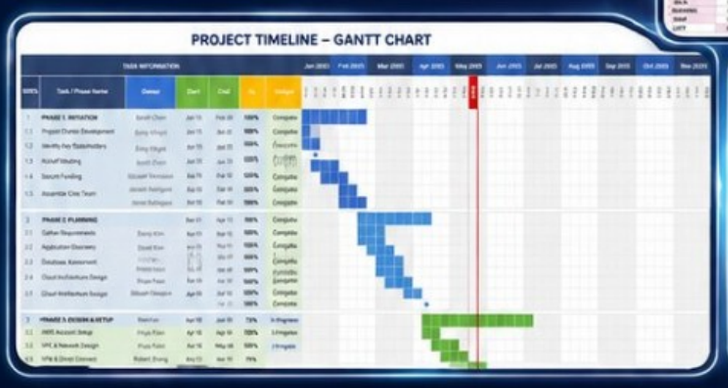
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Assess the full impact

A feature change can affect acceptance, operations and dependencies as well as build work.

Review the dimensions

Examine scope, benefits, quality, schedule, resources, cost, risk, procurement, compliance and operating readiness where relevant. Use input from the people who understand the affected work.

Onboarding case

Another language needs approved content, configuration, representative verification and updated guidance. Check who maintains translations after handover.

Make assumptions explicit

An estimate based only on the screen change can omit review and transition. State what the assessment includes and where uncertainty remains.

TAKE IT TO YOUR PROJECT

List three effects beyond the immediate implementation task.

Calculate the cost and schedule effect

Show the basis of an estimate so the decision maker can challenge it.

Work the cost

The illustrative estimate includes 30 hours of implementation and verification at $50, giving $1,500. A relevant licence charge adds $300. Total proposed addition is $1,800.

Work the schedule

The team estimates two additional working days on the controlling path under the stated resource assumptions. A 20-day plan would become 22 days if this option is adopted.

Check the boundary

These are assessed effects, not automatic approval. Confirm the scope, rate, resource availability and dependency logic behind them.

TAKE IT TO YOUR PROJECT

Recalculate the amount and explain the two-day assumption.

Compare feasible options

A decision should consider the need without assuming one implementation route.

Build the choices

Options can include approve now, defer, split, reduce scope, investigate or decline. Compare value, cost, timing, risks and operating consequences on a consistent basis.

Onboarding case

Adding the language now may improve early usability but affect readiness. A bounded support approach could serve the first group while a later release completes translation.

State the recommendation

Explain why the evidence favours one option and what would change the recommendation. Make unresolved assumptions visible.

TAKE IT TO YOUR PROJECT

Prepare two options that genuinely address the need.

Seek the authorised decision

Interest or a senior request does not by itself approve the change.

Present a focused note

Show the need, current commitment, effects, options, recommendation, evidence and decision deadline. Route it to the owner defined by governance.

Onboarding case

The $1,800 estimate exceeds the example PM's delegated limit. The sponsor considers the broader value, readiness and funding consequences before deciding.

Record the outcome

Capture approver, date, selected option, conditions and rationale. The decision may be approved, rejected or deferred, with clear follow-up.

TAKE IT TO YOUR PROJECT

Identify the exact authorisation needed before work begins.

Update the controlled basis

An approved change can alter several linked records.

Trace the effects

Update the relevant scope, requirements, estimate, schedule, budget, risks, supplier commitments and acceptance records through the agreed process.

Onboarding case

If the $1,800 and two-day option is approved, the illustrative $20,000 baseline becomes $21,800 and the 20-day plan becomes 22 days, subject to the stated decision.

Preserve history

Keep the previous basis and the authorised change link. A revised baseline should not conceal the reason or erase the performance story.

TAKE IT TO YOUR PROJECT

List the records that need updating for one approval.

Communicate the decision

People need to know which commitment is now in force.

Close the loop

Tell the requester and affected delivery, supplier and operating roles what was decided, why and what actions follow. Confirm the current version and owner.

Onboarding case

The team informs the content owner, verifier and service lead of the approved language scope and maintenance responsibility. The requester receives the decision and timing.

Check understanding

Ask the people affected to confirm their action and required inputs. A log status alone may not establish that implementation is coordinated.

TAKE IT TO YOUR PROJECT

Write the information needed by the person implementing the change.

Implement with the required controls

Approval establishes a commitment; delivery still needs planning and evidence.

Assign the work

Integrate the change into the appropriate plan or backlog, establish dependencies and owners, and maintain the relevant quality and reporting requirements.

Onboarding case

The team obtains approved wording before configuration, tests representative paths and prepares updated guidance. It reports remaining work against the authorised change.

Manage new information

If the assessment proves incomplete, raise the issue and seek the necessary decision. Do not treat an approval as permission for unbounded extra work.

TAKE IT TO YOUR PROJECT

Name the completion evidence for the approved change.

Verify and close the change

A change should close from evidence that its required result is complete.

Check the commitment

Compare delivered work with the authorised scope, criteria and conditions. Confirm relevant acceptance and update the final record.

Onboarding case

The service lead checks the agreed language scenarios and the maintenance handover. Any unresolved defect or condition remains visible through the proper route.

Capture learning

Record significant differences between assessed and actual effects. Use the evidence to improve future requests and impact estimates.

TAKE IT TO YOUR PROJECT

State the evidence required before changing a request to closed.

Handle urgent changes proportionately

Urgency changes the route or speed only within the actual authority framework.

Define an emergency path

Agree who can authorise urgent work, what minimum assessment is needed and how records and verification will follow. Keep obligations and quality boundaries clear.

Onboarding case

A critical access failure needs prompt correction before staff arrive. The team uses the approved incident and change route, records the decision and verifies the result.

Review afterwards

Confirm what happened, reconcile the records and address remaining risk or follow-up work. An emergency label should not become a permanent bypass.

TAKE IT TO YOUR PROJECT

Identify the authorised route for one genuinely urgent situation.

Connect change control with adaptive delivery

Learning and formal commitments need compatible decision routes.

Understand the interfaces

Adaptive teams can reorder work as evidence changes, while contracts, funding, operating obligations or wider baselines may still require explicit authorisation.

Onboarding case

The product team can discuss the language need and current priority. If the selected option changes a supplier charge or approved rollout date, coordinate the relevant governance decision.

Keep one story

Align backlog, project and commercial records so people understand the same current commitment. Avoid treating either flexibility or control as a reason to ignore the other.

TAKE IT TO YOUR PROJECT

Trace a product request to any wider approval it requires.



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Your change-control desk check

A controlled request has a clear trail from need to verified result.

Check the decision

Is the need clear, the current basis identified, the impact supported and the authority correct? Are options and conditions visible?

Check implementation

Were affected records and people updated, work assigned and the result verified? Can the team trace the change from request through approval and acceptance?

Use the case

The language addition becomes a deliberate commitment with known effects, rather than hidden work. Review the assessment against the outcome and improve the process.

TAKE IT TO YOUR PROJECT

Follow one recent change through the entire trail and resolve the first gap.