



*Helping Managers and Businesses  
Succeed Through Real Experience*

# Building a Project Change Log

A Step-by-Step Example for Project Managers



# What is a Project Change Log?

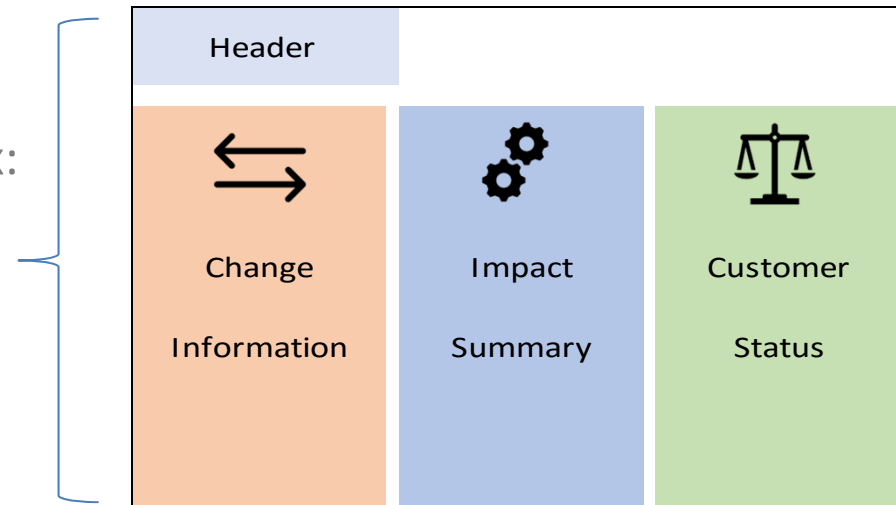
- A Project Change Log is a project management **tool**.
  - Captures change history over the course of a project or program.
  - Serves as a repository for all customer requests.
  - Organizes key details such as reference data, dates, and impacts.
  - Enables project managers to keep a clear record of open/closed changes.
  - Helps program leaders identify and manage scope creep
- A Project Change Log also helps the project leader **manage scope** over time by individually tracking customer requests.

# What Information Should be Contained in a Project Change Log?

- At a **minimum**, a Change Log should include:
  - Date of request
  - Reference / source of request (e.g. email, formal memo from customer, contract letter, etc.)
  - Description and summary of impacts to scope
  - Detailed impact assessment of the change, including costs, schedule, resources.
- You may also want to include:
  - Change status (e.g. “Open,” “Pending Customer Acceptance,” “Accepted,” etc.)

# Project Change Log Structure

- There are three sections of the matrix:
  1. Change information
  2. Impact Summary
  3. Customer Status



**Change Information** should include basic details about the change, how and when it emerged, and reference documentation.

**Impact Summary** should summarize how the change impacts the project, including cost, schedule and resources.

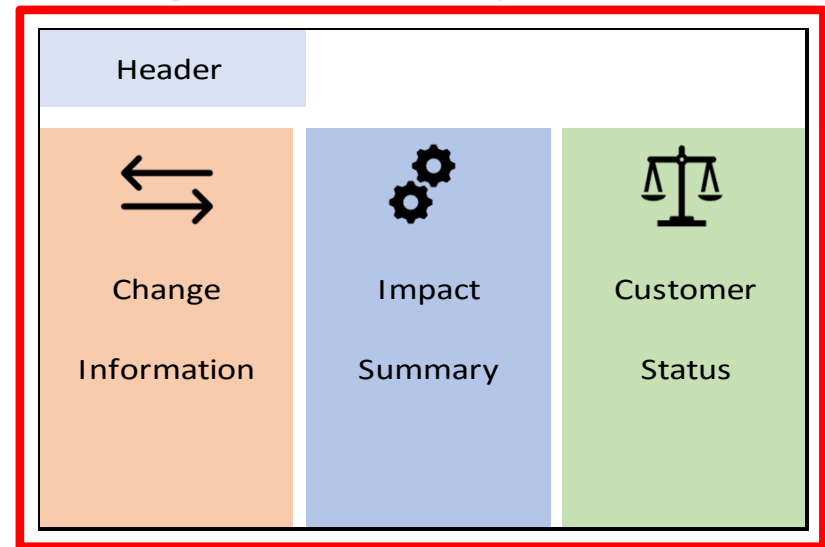
**Customer Status** should track where the change proposal is in terms of customer acceptance – e.g. *Submitted, Negotiating, Accepted, Declined*

## Key Steps in Using a Project Change Log

1. Establish a Header with pertinent project details.
2. Add new changes or customer requests regularly, as they are received.
3. Review with the project team monthly / as needed to capture any missing items or important updates.
4. Use the Project Change Log to organize change history, track each line item individually, and to manage scope creep.

# Program Change Log Example

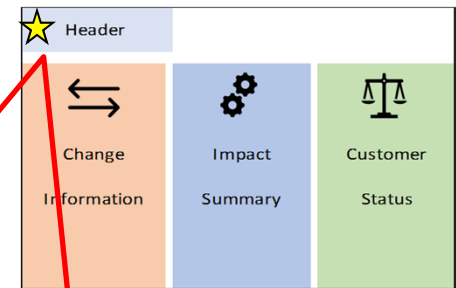
- Overview of the change log structure:
  1. Change information
  2. Impact Summary
  3. Customer Status for Approval



PROGRAM CHANGE TRACKER															
Key Contract Information															
Program Title	Compact Gearbox		Program Manager	David Perce											
Customer	Talon Engine Company		Contract Manager	Mary McGreevy											
Contract Start	7/23/2017 (Signed)		Technical Manager	Jake Walton											
Contract End	7/23/2023		Pricing Manager	Dallas Solaz											
Contract Number	12J-582F-71		Last Log Update	21-Jan-20											
Change Information				Impact Summary					Customer Status						
Change ID #	Date of Request	Change Title / Description	Change Requestor	Reference Documents (Email, Memo, etc.)	Description of Impact	Schedule Impact (Weeks)	NRE (\$K)	RE (\$K)	Current Status	Approval / Reject Date	Approval/Reject Reference (Email, Memo, etc.)	Approved Non-Recurring (\$)	Approved Recurring (\$)	Approved Schedule Impact	Comments and Notes
1	17-Feb-19	Increase main gear speed to 400rpm from 380rpm	Jake Applatan	Talon Program Memo #14	Will need to recalculate gear ratios, modify main gear angles	3 weeks	\$8,400	\$530	Accepted/Started	1-Mar-19	Email from Jake Applatan, 1-Mar-19, "Gear Speed Change Approval"	\$7,200	\$530	3 weeks	N/A
2	4-Apr-19	Material Test Request	Jake Applatan	Talon Program Memo #37	Produce test samples, perform tests, create test report	4 weeks	\$19,200	\$0	Drafted	N/A	N/A	N/A	N/A	N/A	N/A
3	3-Oct-19	Hawing Modification	Marcia Galant	Email 9/13/19 "Hawing Size Change"	Increase hawing height by 2"	2 weeks	\$17,200	\$520	Submitted	N/A	N/A	N/A	N/A	N/A	To Be Discussed in Next Customer Meeting
4	11-Dec-19	Addition of Electrical Sensor	Barry Raquin	Email 11/17/19 "Electrical Sensor for Gearbox"	Add sensor to monitor gear speed	12 weeks	\$29,000	1,400	Rejected	1-Jan-20	Email from Jake Applatan, 1/16/2020 "Cancel Change Request"	N/A	N/A	N/A	Declined due to schedule impact

# Creating a Header

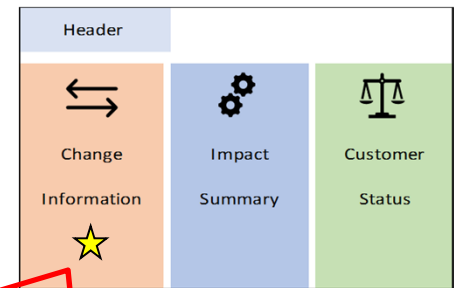
- What to include in a header:
  - Customer and project title
  - Basic project information
  - Identify key personnel and roles
  - Important or relevant dates



<b>PROGRAM CHANGE TRACKER</b>			
<b>Key Contract Information</b>			
Program Title	<i>Compact Gearbox</i>	Program Manager	<i>David Perez</i>
Customer	<i>Tolen Engine Company</i>	Contract Manager	<i>Mary McGreevy</i>
Contract Start Date	<i>7/23/2017 (Signed)</i>	Technical Manager	<i>Jake Walton</i>
Contract End Date	<i>7/23/2029</i>	Pricing Manager	<i>Delia Solas</i>
Contract Number	<i>12J-582F-71</i>	Last Log Update	<i>21-Jan-20</i>

# Project Change Information

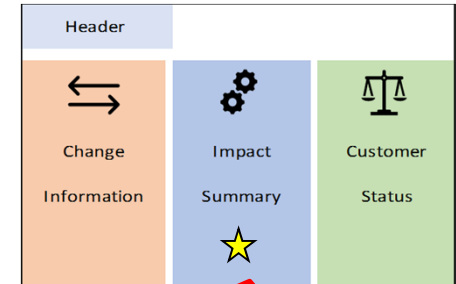
- For each individual change, include:
  - A unique identification number for referencing
  - The date the request was made / received
  - A change title or description
  - Who requested the change
  - Reference information describing the change details



Change Information				
Change ID #	Date of Request	Change Title / Description	Change Requestor	Reference Documents (Email, Memo, etc.)
1	17-Feb-19	Increase main gear speed to 400 rpm from 380 rpm	Jake Appleton	Tolen Program Memo #14
2	4-Apr-19	Material Test Request	Jake Appleton	Tolen Program Memo #37
3	3-Oct-19	Housing Modification	Marcia Galent	Email 9/13/19 "Housing Size Change"
4	11-Dec-19	Addition of Electrical Sensor	Barry Rogan	Email 11/17/19 "Electrical Sensor for Gearbox"

# Change Impact Assessment

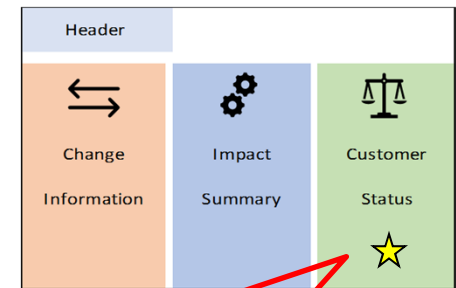
- Each change should have a corresponding impact assessment.
- Your impact summary should include:
  - Brief description explaining what the impact is and how it affects the project
  - Estimated schedule delays
  - Fixed, or non-recurring cost increase
  - Variable, or recurring cost increase (if applicable)
  - **Optional:** Include resource impacts, such as increasing the team size or adding a specific skillset
  - **Optional:** Include impacts on outside suppliers, partners, etc.



Impact Summary			
Description of Impacts	Schedule Impact (Weeks)	NRE (\$K)	RE (\$K)
Will need to recalculate gear ratio, modify main gear angles	3 weeks	\$8,400	\$530
Produce test samples, perform Test, create test report	6 weeks	\$19,300	\$0
Increase housing height by 2"	2 weeks	\$17,200	\$620
Add sensor to monitor gear speed	12 weeks	\$29,000	1,400

# Customer Status & Approval

- The customer approval status section includes:
  - Current status of change (approved, declined, cancelled, etc.)
  - Approval references, such as dates and documentation
  - The funding / financial agreement made
  - Agreed schedule impact / delay
  - Any additional comments for record-keeping purposes



Customer Status						
Current Status	Approve / Reject Date	Approval/Reject References (Email, Memo, etc.)	Approved Non-Recurring (\$)	Approved Recurring (\$)	Approved Schedule Impact	Comments and Notes
Accepted Started	1-Mar-19	Email from Jake Appleton, 1-Mar-19, "Gear Speed Change Approval"	\$7,300	\$530	3 weeks	N/A
Drafted	N/A	N/A	N/A	N/A	N/A	N/A
Submitted	N/A	N/A	N/A	N/A	N/A	To Be Discussed in Next Customer Meeting
Rejected	1-Jan-20	Email from Jake Appleton, 1/10/2020 "Cancel Change Request"	N/A	N/A	N/A	Declined due to schedule impact



# Final Tips for Using a Change Log

1. Consider publishing a 'simplified' version of the Change Log to customer, keeping them aware of the change status
2. Work to close changes requests quickly – the longer they remain undecided / open:
  - a. The more difficult / expensive the work may be later in the project.
  - b. The more “grey area” will emerge relative to your baseline scope. (e.g. “Is it really that big of a deal at this point?”)
3. Keep background notes on how you determine cost and schedule impacts. If the change remains open for an extended period of time, those details may be forgotten.
4. Consider negotiating a ‘package deal’ for several open claims in order to reach a decision.



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