A Checklist for Change

Ready for change? Here are some practical ideas on what to include in your Change Management Plan (CMP)

Manage the Change

Reinforce the Change

**Prepare for Change**

# Why, What and How are we changing?

[ ] Create your elevator pitch for change, and document it in your CMP. Have a consistent message you can communicate quickly (no more than 2-3 minutes) to anyone in the organisation to give them a clear understanding of what’s changing and why.

[ ] Describe how, as an organisation, you are going to get from the current state to the future state. Where are we now, and where do we want to be? And over what timeframe?

# Change Management roles and responsibilities

[ ] Change Management isn’t just the responsibility of the Change Manager - having an active and visible **Sponsor** is important in making any change successful. Helping the Project Sponsor to understand their role and responsibility is paramount for any change.

[ ]  The role of **People Managers** is important too – employees trust and want to hear from their direct managers. The attitude and actions of a manger will flow on to their reporting staff.

[ ]  Don’t forget the **people /employees** impacted by change too – their role is to contribute to the successful outcomes of the change and ultimately adopt the change.

# Stakeholders and Engagement

[ ] Identify your stakeholders and document how you are going to engage them.

[ ] How frequently will you engage with your stakeholders? Who will own the relationship with each stakeholder group?

[ ] What do you know about each stakeholder group – their concerns, needs, areas of interest - and what target engagement state do you anticipate they’ll be at once the change has been implemented?

# Business Impacts

[ ]  By understanding the business impacts of a change, you can tailor your change management approach and relevant change activities according to these specific needs.

[ ] Involve your stakeholders in any impact assessment workshops – plan ahead - have targeted questions or key impact areas for discussion and where possible, share these before a workshop, so attendees can come prepared.

[ ] If possible, you may be able to leverage user stories and personas which can help to understand how those impacted may experience or see a change in their everyday role.

# Communications

[ ] Outline your communication objectives – raising awareness of the change, increasing understanding of how the change fits into wider business priorities, are areas you can explor

[ ] Include a timeline of when and how you will communicate. Who is your audience and what will the key message be? Who will write the communications and who will send them? What channel will you use?

[ ] Encourage two-way communication – exchange ideas, relay any concerns and engage people to contribute to making the change happen.

# Learning

[ ] Learning is one of the levers you can use to help with change management. First, identify your learning audience and understand their learning needs.

[ ] What will be delivered?eLearning module(s), User Guides, Training sessions.

[ ] Include a timeline of when and how learning will be conducted. What will the learning outcome be? Who will create the learning material and where will the learning be published? Who will own it and update it in the future state?

# Adopting and Embedding Change

[ ] How will you know if the change has been successfully adopted and embedded by the business?

[ ] Establish adoption measures. By doing so you can take a baseline (what do we do now) and measure a future state (what will we do in the future).

[ ] Include timeframes and hold people to account – when and how will this measure be assessed, and by who?