

Change Management Checklist

STEP 1

Build the Foundation

- Identify the logical reasons for the change
- Assess change readiness and risk
- Build a business case for the change
- Build a methodology for the communication/people side of change
- Identify desired outcomes and results
- Decide what success will look like
- Allocate resources for change management

STEP 2

Create the Change Communication Process

- Develop change management plan that is aligned to organization wide goals
- Decide when and how the change will happen
- Predict obstacles and identify how to remove them
- Decide who will communicate changes
- Decide how you will ensure communication is timely and clear to all
- Decide what training/coaching people will need
- Identify all the audiences that need to be made aware of the change
- Identify how each audience will benefit from the change
- Identify the most effective channels of communication
- Create a plan to handle questions and two-way communication

STEP 3

Identify Your Execution Team

- Create change management roles and responsibilities
- Present change management plans to execution team & get feedback
- Identify potential resisters to change and understand why
- Identify informal change advocates
- Identify skills gaps needed to adopt new change
- Enable key change advocates to communicate to leadership

STEP 4

Prepare for Training and Resistance Management

- Identify current skill levels and gaps
- Create ongoing and contextual training resources
- Prepare managers to communicate and train new process/tool
- Proactively train managers how to respond to change resistance
- Develop plan to limit resistance
- Create a system to track adoption and usage of the new process/tool
- Establish a way to gather feedback
- Create a system to celebrate wins during change implementation

STEP 5

Review and Reflect

- Inquire with key stakeholders to understand how well you have addressed the problem with this new change
- Analyze metrics to identify and report on progress and success
- Reinforce positive behaviors and reward early adopters
- Continue working with managers to coach to and model the change
- Ensure that policies, procedures, and incentives are consistent with the change
- Decide what corrections need to be made if any and build habits to sustain the change
- Identify what's working and develop a plan to replicate the success