**Change Management Checklist**

**Instructions:**

Answer each of the following questions to ensure that you have fully considered all aspects of the change management process. Check the box only when you are certain that you have satisfactorily addressed each concern.

**Step 1: Laying the foundation**

❑ Have we got logical and compelling reasons for the change and what are they?

* How can we build a solid business case for the change?
* Do we have the full support of the leadership team?

❑ What’s the best way to establish a sense of urgency?

❑ How can we communicate why the change is happening in a convincing manner?

❑ What are the barriers and implications to a successful implementation of the change?

❑ How is the proposed change aligned with our organizational strategy plan?

❑ What is the end state vision?

❑ Who will form the change management team?

❑ What will tell us that we’ve been successful?

❑ How can we paint a picture of what success will be like for people?

❑ Have we incorporated our values and attitudes into this change?

**Step 2 – Learning what we need to know**

❑ What’s actually going to change?

❑ What will people have to give up?

❑ Who will feel threatened by the change and how will I deal with their concerns?

❑ Do people have the skills needed to implement and adopt the new system?

❑ How well do people trust the motives for this change?

❑ Who are the informal leaders who can help advocate for the change?

❑ Who are the supporters of the change and how can we leverage their support?

**Step 3 – Planning the change process**

❑ When and how will the change be introduced and reinforced?

❑ How can we remove obstacles and amplify wins?

❑ What process is in place to get feedback regarding employee concerns?

❑ What communications will we need?

❑ Who should deliver the messages?

❑ What can we do to keep the information flow frequent, timely and clear?

❑ How can we involve some of the people affected by the change?

❑ How can we arrange for people to be coached and supported during the change?

❑ What training will people need?

**Step 4 – Making change work**

❑ How well do people understand what we’re saying about the change?

❑ What do our metrics tell us about our progress?

❑ How well are we reinforcing positive behavior?

❑ How can we motivate and support people during this change?

❑ What are our plans in order of priority to manage resistance?

❑ What are we learning as we implement?

❑ What course corrections need to be made?

**Step 5 – Embedding change in the organization**

❑ How can we make this a natural part of everyday life?

❑ How well have we addressed the problem we set out to solve?

❑ What will we do to recognize and reward achievements?

❑ What remains to be done?

❑ What are our next steps?

**Step 6 – Review the change**

❑ Was the change implemented as planned?

❑ How did the change go versus our expected measures?

❑ What went well?

❑ What could have been improved?

❑ Analyze opportunities from any lessons learned.