

Change Leadership Checklist

So much needs to be done when planning a change—and that’s just the work around creating the new product, process, or solution. Organizations that wish to be successful must deal with the human aspects of change and help people make the transition from the old to the new. Change leaders need to answer key questions in each phase before moving on to the next.

Steps	Key Questions
Laying the Foundation	<ul style="list-style-type: none"> <input type="checkbox"/> Why is change necessary? How can we say this so employees will understand? <input type="checkbox"/> What is the end state vision? How clear and compelling is this vision? <input type="checkbox"/> What pain points will the solution address or ameliorate? <input type="checkbox"/> What is in and out of scope? <input type="checkbox"/> What are the requirements for the end state? <input type="checkbox"/> Who will form the powerful guiding coalition? Who will help with the change? <input type="checkbox"/> What will tell us that we’ve been successful?
Learning What You Need to Know	<ul style="list-style-type: none"> <input type="checkbox"/> What’s actually going to change? What will people have to give up? <input type="checkbox"/> Do people have the skills needed to implement and adopt the new system? <input type="checkbox"/> How resilient is the workforce? How do they generally respond to change? <input type="checkbox"/> How well do people trust their leadership? <input type="checkbox"/> Who are the informal leaders who can help advocate for the change?
Planning the Process	<ul style="list-style-type: none"> <input type="checkbox"/> When and how will the change be introduced and reinforced? <input type="checkbox"/> How can we help people understand what they’re supposed to do differently? <input type="checkbox"/> How can we remove obstacles and amplify wins? <input type="checkbox"/> What communications will we need? Who are the right people to communicate those messages? <input type="checkbox"/> How will we draw on the organization’s informal leaders to help? <input type="checkbox"/> What training will people need?
Making It Work	<ul style="list-style-type: none"> <input type="checkbox"/> How well do people understand what we’re saying about the change? <input type="checkbox"/> What do our metrics tell us about our progress? <input type="checkbox"/> How well are we reinforcing positive behavior? <input type="checkbox"/> What are we learning as we implement? <input type="checkbox"/> What course corrections need to be made?
Embedding in the Organization	<ul style="list-style-type: none"> <input type="checkbox"/> How can we make this a natural part of everyday life? <input type="checkbox"/> How well have we addressed the problem we set out to solve? <input type="checkbox"/> What remains to be done? <input type="checkbox"/> What are our next steps?