

# CHECKLIST

## Model for Change

This Checklist, (total five pages), is for the person seen to be “managing the change”

### Step one. Reviewing

1. Have you thoroughly understood the drivers for change?
2. What type of change are you facing: incremental (go to question 3) or fundamental (go to question 4)?
3. How should you approach the incremental change, having regard to urgency and the amount of resistance you expect to encounter?
  - High urgency/low resistance. Focused participation
  - Low urgency/low resistance. Extensive participation
  - Low urgency/high resistance. Persuasive
  - High urgency/high resistance. Persuasive/coercive  
(Go to question 5)
4. How should you approach the fundamental change, having regard to the urgency and the degree of resistance you expect to encounter?
  - High urgency/low resistance. Visionary/charismatic
  - Crisis/low resistance. Visionary/persuasive
  - High urgency/high resistance. Visionary/coercive
  - Crisis/high resistance. Dictatorial
5. Modify your choice of change strategy as a result of your answers to the following:
  - Do those you wish to involve those who have the ability to participate?
  - Are they motivated to participate?
  - Does the need for confidentiality affect your ability to involve others?
  - Does involvement (or lack of it) fit the culture of the organisation?
  - How important is the post-change motivation of employees?
6. For all choices of approach, ensure that you understand the reasons for resistance:
  - What threats are those affected likely to feel?
  - Do you understand the basis of their psychological contracts?

## CHECKLIST

- Will there be resentment at imposed change?
  - Do they have faith in those making the change?
  - Do you understand the emotional hang-ups?
7. How can you reduce resistance? Consider the value of:
- Participation
  - Communication
  - Training.
8. For all change situations, have you assessed the implications and effects of the change?
9. Have you used force field analysis or other approaches to think through all aspects of the change?
10. Have you considered all aspects of the change to the organisation, as below, and thought through, which elements have to change and how these affect the other elements?
- The desired change
  - Tasks
  - People
  - Structure
  - Decision processes
  - Culture
  - Goodwill
  - Information systems
  - Control systems
  - Reward Systems
  - Operational systems
  - Intended Results
11. Is your change:
- (a) Incremental and with relatively minor impact on the elements of the organisation. If so, move to question 12.
- (b) Incremental with a complex impact on the organisation? If so, move to question 14.
- (c) Fundamental? If so, move to question 14

## CHECKLIST

12. If your answer to 11 (a) is yes, then:

- Have you gone through all the points so far so that you have a clear definition of the change and the way in which it must be implemented?
- Have you established action plans to implement?
- Have you set up a way of monitoring progress?

13. Good luck, you should be ready to implement.

14. All other change situations will benefit from a structured approach. Are you ready to use the findings from your analysis so far to modify how you use the approach?

### Step two. Be clear on the vision

Is the vision:

- Credible?
- Challenging?
- Consistent in all parts?
- Clear?
- Providing a bridge from the past to the future?
- Something that you believe in whole-heartedly?

### Step three. Get the message across

Have you determined how to get going?

- How to demonstrate your own belief in the vision.
- How you will use personal contact to communicate the vision.
- Whether to use workshops and conferences.
- How opportunities for two-way communication can be created.
- What communication media will be used to support the messages.
- How you can use everyday meetings to build the vision.
- The use of external public relations.
- How you will seek out and use examples of success.
- How to check that training is reinforcing the vision?

# CHECKLIST

## Step four. Help people through

Have you thought through a strategy for giving support by:

- Expressing confidence in those working with you to implement the change?
- Providing coaching when it is needed?
- Empowering key people?
- Having empathy with those involved in the change?
- Using praise and thanks when appropriate?

## Step five. Plan the actions needed

Have you thought through the detailed implementation actions to make the change happen, including:

- Strategies to implement the vision?
- Short-term plans and budgets to turn strategies into action plans?
- Project management for complex situations?

## Step six. Monitor and control the change process

How will you monitor and control the change process?

## Step seven. And Finally

- Have you thought how you will motivate by giving recognition to those playing a part in the change process?
- Are you emotionally prepared to deal with all the unexpected things that will crop up, and all the matters you should have thought of but overlooked?
- Have you given thought to how you might reduce the levels of stress that those under you will feel when the change is implemented?
- Have you given attention to the particular problems of the reactions of survivors, if the change has involved people having to leave the organisation?

## CHECKLIST

- Will the change affect departments other than your own in a fundamental way?
  
- And finally, have you:
  - A clear understanding of the change?
  - Evidence to support the need for the change?
  - Assessed the levels of support you are likely to receive from your boss and the top management of the firm?
  - Considered the value of finding a champion for the change from the ranks of top management?
  - Examined ways that you can get key managers on your side through participative approaches?
  - Understood the dangers that face a specialist unit that suggests major change, but is otherwise isolated from the organisation?
  - Developed a plan for gaining top management commitment to your vision?
  
- If you have followed the points through, you should have a comprehensive approach mapped out that will enable you to implement in an effective way. Remember that there is a continuous nature to many of the steps, and that some will be repeated. It will be a routine activity in a changing future, which involves learning to learn and being a continuous learner.