



## CHECKLIST: CORE FACTORS IN CHANGE MANAGEMENT

These seven factors summarize the conditions, resources, and processes that support successful change. They align with models and frameworks developed and applied by many leaders and industries.

This checklist can provide you with a framework to use as you begin planning for change.

- Strategic Clarity:** Be clear about the purpose of the change, its direction, the expected outcomes, and the approach.

The myth: "The purpose and plan can't be reduced to a few sound bites."

*The reality:* Participants will make assumptions (which are often incorrect) if they aren't given a clear, concise summary.

- Embedded Measurement:** Set clear and measurable goals for the overall effort and key components; assess progress, adjust, and fine-tune as needed.

The myth: "You can't measure this; there's no data; it will stir things up."

*The reality:* Measurement evaluates progress and guides corrective action—based on real qualitative or quantitative data.

- Stakeholder Engagement:** Build a sense of ownership, belonging, and commitment; consult with and involve individuals and groups most affected by the change.

The myth: "Asking for input takes too long. And we know what they think."

*The reality:* Informal communication can rarely replace effective research. Even a minimal effort to obtain input can develop ownership.

- Critical Resources:** Put in place the resources (e.g., financial, human, technical) to enable the change to be effectively implemented.

The myth: "I know they're busy, but they'll find the time."

*The reality:* They may find time, but ongoing tasks will suffer, or the change effort will get limited buy-in.



- Functional Alignment:** Ensure that systems and processes (e.g., sales, rewards, information, accounting, manufacturing, training) support the change.

The myth: "We can get those changes dealt with when things settle down."

*The reality:* The pace rarely slows; in most organizations, there are multiple overlapping initiatives, and few if any periods of stability.

- Committed Leadership:** Guide, train, and coach leaders at every level so that they are equipped and motivated to support the change.

The myth: "We don't have to educate managers; it's their job to do this."

*The reality:* It may be their job, but they must be educated, convinced, trained, and supported to effectively manage the change.

- Sustained Communication:** Facilitate an effective two-way flow of information, be aware of issues and questions, and provide timely responses.

The myth: "They'll figure it out for themselves; they'll adjust."

*The reality:* What they figure out for themselves may not align with the purpose and desired outcome; it's better to communicate clearly.