Example Change Plan

Use this checklist as the start of your own Change Plan template. Under each heading, add in the specific teams, departments and functions that apply to your change initiative.

1. Understand the impact:

1. Does the change impact what the team does?
2. Does he change impact how the team does the work?
3. Does the change impact who is involved?
4. Does the change impact the recipients/customers of the work that the team does?
5. Does the change affect the inputs to the team and/or the suppliers of these inputs!

2. Plan how to accommodate the impact:

1. How to balance amount of time on 'business as usual' and change activities.
2. Decide who is going to be most involved in leading the changes and how to reduce their workload to accommodate this.
3. Plan the training and coaching programme needed to develop skills in managing change for those most involved in leading the changes using a KSA Chart – Knowledge; Skills; Attitudes.
4. Develop a plan of change activities for each team, department and function impacted by the change.

3. Implement the change:

1. Identify which processes remain the same, amend processes subject to small-scale change, re-design ways of working where necessary.
2. Identify new skills and behaviours needed for each role - summarise in a RACI table – Responsible; Accountable; Consulted; Informed.
3. Identify preferred methods of training for each new skill:
   a. Formal training courses - good for technical skills and complex work practices
   b. Buddying up for on the job training -good for small-scale changes to existing procedures, keeps involvement very direct to those being affected
   c. Workshops - good for identifying how people will need to work differently and building team spirit across all those affected
   d. Coaching - good for those that need one to one brainstorming to work out with a neutral person how to lead others through change
   e. E-learning- good as a back-up to other face to face methods and for very large groups who have to change what they do technically but don't have to change behaviour
4. For any changes to systems consider how data in your existing systems will continue to be accessed or will be archived
5. Create announcements, explanations and presentations for any of your customers, suppliers, regulators, opinion formers and colleagues about your changes

4. Embed the change

1. Create new performance metrics to measure the effectiveness and benefits of new ways of working
2. Create a new organisation structure and job descriptions to reflect the changes to the team
3. Make sure these changes are reflected in the objective setting in your performance appraisal method
4. Liaise with your Quality Management Team about your new processes, performance metrics and organisation structure to ensure the Quality Management System reflects new ways of working
5. Update your Internal Audit function or Compliance team with your new processes so they will audit your team against how you work and not how you used to work