

## CHANGE MANAGEMENT CHECKLIST

### 12 Strategic Musts for Successful Transitions

Implementing a new system or process change is not just a technical endeavor. To succeed with any major rollout, you must take into consideration the disruption in user processes as well as the communication and project management needed to ensure a smooth transition. The best way to bridge this gap is with a smart change management plan. Here's a checklist to keep you on track.

BEST PRACTICE	IN PROGRESS	COMPLETE
<p><b>1 State the value</b> Articulate clear objectives for the transformation initiative and the value it will bring.</p>	<hr/>	<hr/>
<p><b>2 Manage change from the beginning</b> Include the right people and resources in the kick-off and requirements definition, and connect them to project sponsors and product owners.</p>	<hr/>	<hr/>
<p><b>3 Identify stakeholder impact</b> Analyze the significance of the change on stakeholder groups and how much influence each group actually has on the change.</p>	<hr/>	<hr/>
<p><b>4 Develop a communications plan</b> Consider not only basic stakeholder updates, but also touch points for leadership and all affected employees to proactively address concerns and increase their comfort level with the upcoming change.</p>	<hr/>	<hr/>
<p><b>5 Determine core processes affected by change</b> What processes will need to be modified or retired to support the change? What new ones will need to be developed?</p>	<hr/>	<hr/>
<p><b>6 Conduct a current state process assessment</b> How do core processes work today? What do people like and dislike about them? Where are opportunities to automate and simplify?</p>	<hr/>	<hr/>
<p><b>7 Address process gaps and identify solutions</b> Determine improvements for existing process gaps and leverage new technology to make improvements in the future state design. Set measurable improvement targets to show efficiency gains.</p>	<hr/>	<hr/>

BEST PRACTICE

IN PROGRESS

COMPLETE

<p><b>8 Support the future state</b> Design an operating model to support future state processes that organizes functions by work flow and/or common skills required to perform tasks, then align people to these functions.</p>	<hr/>	<hr/>
<p><b>9 Plan for end-to-end testing</b> Work out bugs before the launch by letting employees use the new technology to its fullest for their new job functions and processes.</p>	<hr/>	<hr/>
<p><b>10 Communicate new roles and responsibilities</b> Inform employees about the change's impact on their work, its benefits and how leadership will support them during the transition.</p>	<hr/>	<hr/>
<p><b>11 Transfer knowledge</b> Develop training materials, job aids and other tools to prepare employees for the new application(s) and processes.</p>	<hr/>	<hr/>
<p><b>12 Evaluate the implementation</b> Through surveys, focus groups, formal lessons-learned discussions and other methods, collect performance metrics and feedback to assess the change's impact on people and processes and the effectiveness of your change management tools and tactics. Measure data against improvement targets to confirm goals were met.</p>	<hr/>	<hr/>

Change may not come easily, but it doesn't have to be painful. Following this checklist above, with particular attention to planning and communication, will position you for a successful transformation.

**And remember, if you need help along the way, Celerity's Business Transformation team will take you in the right direction.**

