The Change Checklist
Seven Critical Success Factors For Organization Change Efforts

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Before you begin a change initiative, use this checklist to make sure you don't launch prematurely. If you are already involved in a change initiative, use this checklist to plan your next steps; or if the effort is floundering, use this to identify what needs to be addressed.

☐ **1. A compelling logic that establishes a sense of urgency.**

People need a compelling reason to change -- whether it's a business opportunity or challenge. A majority of the organization's management must be honestly convinced that business-as-usual is totally unacceptable.

☐ *2.* **Visible leadership capability and commitment.**

The senior leaders must be aligned as a team, understand their role as leaders, and demonstrate commitment. They need to be actively involved, with a sense of ownership and responsibility for success. A powerful coalition must be established to guide the effort that includes the key decision makers, people with expertise in the new direction, and people who understand the current organization and the challenges.

☐ **3. A vibrant and unifying vision that guides all work.**

The purpose of the change effort needs to be explicit and understandable. A picture of the future, that is relatively easy to communicate and appeals to employees and other stakeholders, is crucial – one that clarifies the direction in which the organization needs to move and goes beyond the numbers typically found in business plans. People must see a direct connection between the goals of the change effort and desired business results, and they must see a connection with their own initiatives, projects, and daily activities.

☐ **4. Early and deep involvement.**

The more people need to change, the more involved they need to be in creating the vision and the plans to implement it. Critical decisions that must be supported throughout the organization need input from representative points of view of all stakeholders. In order to successfully implement a change effort, you must push down through all levels and empower and enlist the front line as change agents, without leaving anyone out of the loop along the way.

☐ **5. A roadmap for the change effort.**

Everyone in the organization needs to be understand the change effort, what phase they're in, and where they fit. Ensure common understanding through a "change roadmap" that demonstrates how the change effort links to other current initiatives and daily work. It should include major events, timelines, milestones, roles of stakeholders, how the effort will be monitored, how success will be measured and how coordination with any other initiatives will occur to avoid duplication of work. The roadmap must also lay-out a process for the change that is congruent with the goals of the change effort *(e.g. if change effort involves new technologies, use new technologies in communications)* and that ensures leadership actions and decision-making are aligned with the vision. It should include a plan to create short-term wins in order to maintain momentum.

☐ **6. Ongoing communications.**

Clear and frequent messaging and communication are essential to keep the change effort front and center of peoples' minds. Early on it is important to broadly communicate the logic for the change effort and the vision of success. In later phases, it is important to continue to reiterate the vision, keep people up to date on progress and to communicate the short-term wins as well as the big ones.

☐ **7. Change work linked to real work.**

Linking the work of the change effort to real work allows people to continue accomplishing their current work and not risk dropping the ball on today's business. Since discussions about the change are integrated into everyday activities, people don't feel like there are two different things going on – the "real" work and the extra work of the change effort. Change work becomes part of everyone's job….every day. The more each person assumes accountability for making effective, needed changes every day, the faster and smoother the change effort will proceed. Furthermore, tying change work to what people consider real work embeds it sustainably in every aspect of the organization.