Prosci's **Change Management Planning Checklist** draws from benchmarking research with over 900 participants and the feedback and input of hundreds of training participants. The checklist can be used as an audit tool to ensure you are using a systematic, holistic approach to managing change. The [Change Management Toolkit](#) and online [Change Management Pilot](#) include complete assessments, guidelines and templates. Contact one of Prosci's change management analysts at 970-203-9332 or changemanagement@prosci.com for more information.

Prosci's Change Management Planning Checklist

Are you using a structured change management methodology for your project?
The 2005 study showed a significant increase in the number of projects using a structured methodology - from 34% in 2003 to 55% in 2005. Additionally, participants cited the use of a structured process and tools as the number two contributor to success, behind only effective sponsorship. Correlation analysis shows that change management efforts using a structured approach are more effective and more likely to achieve project objectives.

Are you customizing your change management plans?
A 'one-size-fits-all' approach to managing change is ineffective. Change management strategies and plans should be scaled based on two factors: 1) the specific characteristics of the change (type, breadth, size, etc.) and 2) the organizations being impacted by the change (history, culture, etc.). Be sure that the change management approaches match the actual initiative that is being managed.

Does your approach include a model for how individuals experience change?
Successful organizational change can only occur when each individual impacted by the change goes through their own personal transition. The most effective approaches to managing change combine an individual model for how people experience change (such as ADKAR®) with the organizational tools that can be used to support this individual change (communication, sponsorship, coaching, etc.).

Does your project have the necessary sponsorship?
Sponsorship - the active and visible participation of the leaders who authorized and funded an initiative - is repeatedly cited as the number one contributor to success. The level of the primary sponsor must match up with the size and type of change and the groups being impacted by the change. Determine if the change has the right level of sponsorship before moving ahead.

Are your sponsors prepared and able to fulfill the role of sponsor?
The 2005 study identified three key roles of sponsors - participating actively and visibly throughout the project, building the needed coalition of leaders and communicating directly with employees. Many times, change agents must coach their senior leaders to fulfill these roles - both making them aware of the roles and supporting the execution of the roles.

Have you created an effective communication plan?
Effective communication plans are targeted to the audience, use a variety of channels, provide feedback opportunities and capitalize on the preferred senders of change messages. Be sure that the communication plan is not just deciding what you want to tell someone, but architecting a complete approach to ensuring that receivers understand and internalize your key messages.

Have you engaged managers and supervisors in the change management program?
Managers and supervisors play a crucial role in making organizational changes successful. They are preferred senders of messages related to how a change impacts employees specifically. They play a central role in identifying and managing resistance. And they have the unique and close relationships with their direct reports that allow them to be effective coaches. A complete change management approach includes a coaching plan for getting them involved and supportive of the change. In addition, the coaching plan provides the tools to support them in their role as coaches during the change.

Do you have proactive and reactive resistance management strategies and plans in place?
Resistance management is a central component of change management. Proactive resistance management involves identifying what resistance might look like, where it might come from and ways to answer objections and build support early in the project. Reactive resistance management includes ways to effectively deal with resistance when it does emerge during implementation. A good change management approach includes both of these tools.

Do you have systems in place to gather feedback and measure change adoption?
Ultimately, it is all about achieving results. Successful change management means that projects meet their objectives and employees adopt the solution. Before the project is implemented, think through how you will know if the project is meeting objectives. Gather feedback from employees to find out their position and if they have made the personal change successfully.

Have you implemented reinforcement mechanisms?
The project's success will ultimately be determined by whether or not the change sticks. Be systematic and structured when you develop ways to reinforce the change and keep it in place. Reinforcement does not take place only at the end of a change - implement mechanisms to keep the change in place throughout the project. Without reinforcement mechanisms, employees will tend to revert back to the old way of doing things and find work-arounds.

The contents of the checklist are based on Prosci's **2005 Best Practices in Change Management** benchmarking report and the Prosci change management methodology, which is available in the hardcopy **Change Management Toolkit** or the online **Change Management Pilot**. Email a change management analyst at changemanagement@prosci.com or call 970-203-9332 for more information. You can find out more about the products at www.change-management.com/bookstore.htm.