



NAVIGATING CHANGE

Strategic Planning Checklist

The support you need during a difficult staff reduction.

Establishing a solid plan to navigate a Reduction in Force (RIF) will put your entire team at ease. IMPACT Group partners with HR teams to provide experienced support and strategic information and resources to help you manage downsizings, rightsizings, mergers and acquisitions of all sizes.

We'll partner with your team to develop training to address your specific goals and needs for the four phases of the reduction. Then, we'll provide outplacement support that is tailored to your company's values, ethics and business objectives.

Partner with IMPACT Group to turn this time of change into a time of opportunity.



PHASE 1 *Making the Decision*

As you evaluate your reasons for reducing your workforce, analyze how it will affect the remaining workforce, your community and the financial stability of your company.

Another area to uncover is redeployment/retraining options. IMPACT Group offers résumé, interviewing and career guidance for separated employees and those eligible for redeployment.

Key areas to address in this phase include:

- Determine how many positions will be eliminated and create a budget for the RIF.
- Stay in front of the potential negative affects the RIF will have on your organization as a whole.
- Develop a plan for maintaining the morale and performance of the remaining employees.
- Ensure your HR team and managers are up-to-date on any relevant Federal and State regulations.

PHASE 2 *Planning and Preparation*

Careful planning will help your reduction go as smooth as possible. In this phase, it's important to focus on creating severance packages, empowering your separated employees and ensuring the notification message is clear and compassionate.

PHASE 3 *Managing Notification Day*

As separated employees face the news, your team needs to be prepared for a variety of reactions. Provide notifying managers with the paperwork and information they need, address the immediate grief needs of separated employees and talk with your remaining staff as soon as possible.

PHASE 4 *Leading Company Recovery*

A "Going-Forward Plan" will help your company recover and provide remaining staff with a clear direction. It is important to maintain open communication after the RIF. IMPACT Group can help you create a strategy for supporting high-potential employees. We can also provide direction on holding company-wide meetings to address any issues.

PHASE 1 *Making the Decision*

☐ **Company Mission and Future Direction**

How will the re-organization affect the mission and future direction of the company?

Have you identified the business reasons for cutting staff?

What other cost-cutting measures has the company put into place?

☐ **Rationale**

What are the business reasons for reducing staff size?

Are there optional strategies for reducing the workforce size?

☐ **Effect on Organizational Structure**

What departments and functions will be affected?

How will the functions be performed and managed after the re-organization?

☐ **Effect on Staff**

What criteria will be used to determine who will be laid off?

Who will the criteria effect?

- Union staff
- Exempt staff
- Executives
- Nonexempt staff
- Management

What is the profile of the dismissed employees?

What will be the effect on affirmative action and cultural diversity?

What will be the effect on the remaining, strategic workforce?

How will the company maintain the productivity and morale of the remaining workforce?

PHASE 1 *Making the Decision*

☐ Re-deployment Opportunities

Will employees be given the opportunity to look for other positions within the company for a specified period? *30 days – 60 days – 90 days*

Will employees receive training in résumé, interviewing and job search strategies?

Will support be provided via group settings, a one-on-one coach or a combination of both?

Who will provide the re-deployment services?

- Internal human resources staff
- National career transition firm and internal human resources staff

☐ Legal Impact

What are the federal/state requirements for voluntary/involuntary dismissals?

Is there evidence or the appearance of unlawful discrimination?

What are the legal rights of employees according to internal company policies?

☐ External Affect

What will be the impact on the customer, client or supplier?

How will the downsizing affect the community?

How will the downsizing affect the competition?

What will the stockholders say or do?

How will the media report the news?

Who will be the prime company contact for each of the above groups?

What message about the company will be given to each of these groups?

PHASE 2 *Planning and Preparation*

☐ **Severance Packages and Other Monetary or Perk Options**

What severance package is currently offered to non-management employees?

What severance package is currently offered to management employees?

Does the severance package need to be changed for this project?

What special “sweeteners” might be offered for those signing waivers?

Has the company reference policy been explained in the separation package?

☐ **Manager Notification Training**

Who will deliver the news?

Has this group been formally trained on delivering the message to protect the culture, identity and brand of your company?

Is the group prepared to handle difficult reactions and deliver a clear message?

Do the managers understand what to avoid during the meetings?

Do the managers know how to structure the meeting and how long the meeting should be?

Has HR approved a script or talking points for managers to use during the meeting?

PHASE 2 *Planning and Preparation*

☐ Transition Services

What kind of transition services will be available for each level?

- Executives
- First-line supervisors
- Union employees
- Middle managers
- Hourly staff

Who will provide the transition services? National career transition firm? Diversity of suppliers?

When will separated employees be able to start the career transition services?

Will employees be supported until they find their next career opportunity?

Will an EAP representative be on site the day of notification?

- Will separated employees have any access to EAP after last day of work?
If so, how long and how will services be accessed?

PHASE 3 *Managing Notification Day*

☐ Notification Day Planning

Have notifying managers been prepared and trained for the notification day?

Have all written materials for separated employees been prepared?

- Notification of last day of work (and/or time of termination)
- List of benefits available
- COBRA information
- Notification of pay in lieu of notice
- Explanation of career transition services
- List of company services (Employee Assistance counseling)

What outplacement services will be offered to separated employees?

- Dedicated one-on-one coaching support
- Group meetings to explain career transition support offerings

Will support be provided the same day? In person, via webinar or via phone?

Will computer and phone access be cut off before or at the time of notice? Who will monitor?

How will employees retrieve personal items from their workspace and computer? Are they allowed to send “goodbye” email to clients, staff, etc.? If so, how will the guideline be communicated?

Will employees be escorted to clean out their space (in high-security type environments)? If so, how will dignity be maintained?

Will employees have the option to claim personal items immediately? Will they be given an option to schedule a time to come back at a later date?

Will boxes for personal goods be brought to work space or be available in a centralized area?

PHASE 3 *Managing Notification Day*

☐ **Workforce Communications and Activities**

Is a plan in place to communicate with remaining employees immediate after the notifications?

How will you communicate with remote workers?

Will “survivor” workshops be facilitated? Will they be conducted by an impartial third party, such as an outplacement provider?

Do you need to create a third-party communication plan?

PHASE 4 *Leading Company Recovery*

☐ Going Forward Strategy

How will you provide support to high potentials / high performers?

How will you train and direct leadership to continue to be transparent, available and present?

Will you hold company-wide town hall meetings to address questions and concerns?

Who needs to be involved in redistributing workloads, with an emphasis on the path forward?



Plan ahead! Contact IMPACT Group to prepare your team today.
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ABOUT US

IMPACT Group is a WBE-certified global leader in relocation support, outplacement assistance and leadership development solutions. We unlock career potential and empower talent with the knowledge, skills and tools they need to move their careers forward.

IMPACT Group assists leading companies around the world by coaching employees through every career transition. Partner with an industry expert to ensure your reduction in force (RIF) goes as smoothly as possible for everyone at your company.