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Transformational Change Management

Assess
1. Assess the Project/Program
2. Conduct Stakeholder Analysis
3. Perform Change Impacts' Assessments
4. Complete a Target Audience Analysis
5. Conduct a Preliminary Organization Readiness
6. Complete a Change Risk Analysis

Develop
7. Choose Change Approach & Tools
8. Develop a Change Management Strategy
9. Establish a Change Management Group & Roadmap
10. Develop Detailed Change Plans

Deploy
11. Execute Change Plans
12. Deploy Change Champions/Agents Network
13. Deploy Communications Plan
14. Conduct Coaching & Training
15. Manage and Resolve Resistance

Normalize
16. Track and Measure Adoption
17. Resolve Adoption Roadblocks
18. Follow-Up / Support Calls
19. Celebrate Successes

Exit
20. Hand Off Responsibilities
21. Final Report & Lessons Learned

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Change Management Steps & Tasks Checklist
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Intro

Based on multiple requests we have received from change managers and project leads; we have put together the list below of change management steps and tasks that change practitioners should complete depending on their project.

Do I Need to Complete All These Change Management Tasks?

Phase	Tasks	Done?
1: Assess	(1) Assess the Project/Program	
1: Assess	(2) Conduct Stakeholder Analysis	
1: Assess	(3) Perform Change Impacts' Assessments	
1: Assess	(4) Complete a Target Audience Analysis	
1: Assess	(5) Conduct a Preliminary Organization Readiness	
1: Assess	(6) Complete a Change Risk Analysis	
2: Develop	(7) Choose Change Approach & Tools	
2: Develop	(8) Develop a Change Management Strategy & Roadmap	
2: Develop	(9) Establish a Change Management Group	
2: Develop	(10) Develop Detailed Change Plans	
3: Deploy	(11) Execute Change Plans	
3: Deploy	(12) Deploy Change Champions/Agents Network	
3: Deploy	(13) Deploy Communications Plan	
3: Deploy	(14) Conduct Coaching & Training	
3: Deploy	(15) Manage and Resolve Resistance	
4: Normalize	(16) Track and Measure Adoption	
4: Normalize	(17) Resolve Adoption Roadblocks	
4: Normalize	(18) Follow-Up / Support Calls	
4: Normalize	(19) Celebrate Successes	
5: Exit	(20) Hand Off Responsibilities	
5: Exit	(21) Final Report & Lessons Learned	

Change Management Process Steps & Tasks (Brief Overview)

(1) Assess the Project/Program

When you initially join a project as a Change Manager or a Project Manager, your first priority should be to conduct a thorough review of the project. The goal of conducting a project assessment is for you to understand the scope, scale, objectives, timeline, and driving factors behind the project. This knowledge enables you to rapidly ramp up and start developing and implementing your change management activities.

Read more: [Best Practices for Conducting a Project Assessment](#)

(2) Conduct Stakeholder Analysis

Understanding the stakeholders of a project is another important task that you need to complete early on. This is a very important part of an effective change management procedure as it increases the success of your stakeholder engagement and management. Stakeholder analysis involves identifying managers and business leaders that belong to impacted groups. These individuals are referred to as key stakeholders because they have a stake in the success of the business change.

Read more:

- [Stakeholder Analysis & Mapping](#)
- [Stakeholder Engagement & Management](#)

(3) Perform Change Impacts' Assessments

Conducting a change impact analysis is one of the key tasks that you need to complete as a change practitioner implementing change management. An impact assessment allows you to identify the groups, departments, functions, and job roles that will be impacted by the change. Conducting a change impact assessment will also allow you to identify the specific business processes and legacy technology tools that will be impacted (or replaced) by the change.

Read more: [How to Conduct an Effective Impact Assessment + Tools & Samples](#)

(4) Complete a Target Audience Analysis

Audience analysis is the process of assessing a target audience to engage with that audience and fulfill key objectives, goals, and mandates.

This process involves understanding the details of the project's targeted audience. Whereby a change impact assessment analyzes the departments and job roles that will be impacted, the target audience assessment takes that assessment one step further by identifying the people (the "John Does" and "Jane Does") that perform the job roles that will be impacted. As part of your assessment steps to implement change, you want to identify the names, emails, departments, contact information, geographic location (important for when it comes time to training), and other individual details.

Read more: [Conducting a Target Audience Analysis](#)

(5) Conduct a Preliminary Organization Readiness

An organizational change readiness assessment is the set of tasks that you complete to identify how prepared an organization is for a particular change. The level of change readiness that is assessed will be based on the scale of the change itself, as well as the severity of the impacts.

When a business goes through change, the impacted audience groups need to be prepared and ready for the change. This readiness includes things like the unfreezing stage of change so new behaviors can be adapted to.

Read more: [Organizational Readiness Assessment and Why You Need to Do It](#)

(6) Complete a Change Risk Analysis

At the early stages of a project, it is essential for you to do a quick assessment of the risks that the organization will face during this change. Part of this risk assessment will involve identifying any known trouble spots or potential areas for resistance that you'll need to address when implementing change management.

Read more: [Conducting a Quick Change Risk Assessment](#)

(7) Choose Change Approach & Tools

A change management approach, model, and/or framework guides you in the process of change management. Organizations will typically designate a specific approach to be used for a change project or may use a hybrid of more than one change model. You will also need to identify the software tools or spreadsheets you'll be using to document and analyze your data.

When you create your change management strategy (aka Strategic Playbook), you'll want to indicate which change approach is being used to govern the project and the tools you plan to use to enable the change team and keep track of your change management task list.

Read more: [A Top Change Management Framework for Change Practitioners](#)

(8) Develop a Change Management Strategy & Roadmap

A change management strategy (aka Strategic Playbook) needs to be developed that will provide stakeholders and leadership with an overview of the various strategies that you will be using for your change management deliverables. This strategy for business process change management includes your communications, engagement, organizational readiness, leadership engagement, training, and post-go-live deliverables.

When developing your strategy, you should also create a robust change management roadmap during these change management steps. Ensure that you align your roadmap to the program's implementation timeline. The roadmap is an easy way to provide the key information about the change project including deliverables, milestones, dependencies, and more.

Read more: Change Management Strategy Guide & Free Playbook

See also: Change Management Roadmaps

(9) Establish a Change Management Group

Although not mandatory, it is important for you to establish an Organizational Change Management (OCM) Working Group. Invite members of the program team (Project Managers, Program Managers, Architects, and other resources), as well as change champions and selected stakeholders, to participate in your group. This group will be your mastermind group.

In general, during change management exercises, the roles and responsibilities of the group will include:

- Participating in change management planning and execution. Reviewing and providing feedback on:
    - Awareness email communications
    - Communication plans and messages
    - Training program and curriculum
    - Go-live preparations
    - Post-go-live change reinforcement activities
- Provide input on your change management tools, templates, plans, and deliverables
- Help you in conducting change impact assessments
- Help in remediating resistance
- Help in connecting Change Lead/resources with key resources, leaders, and managers

(10) Develop Detailed Change Plans

One of the larger undertakings on your change management checklist template will be the development of detailed change management plans. These include plans for several different areas of your change management activities.

- [Communications Plan](#)
- [Sponsor/Leadership Enablement Plan](#)
- [Coaching Plan](#)
- [Stakeholder Engagement and Management](#)
- [Target Audience Engagement Plan](#)
- [Change Champion Networks](#)
- [Tracking and Measurement Plan](#)
- [Resistance Management Plan](#)
- [Training Plan](#)
- [Change Team Transfer/Exit Plan](#)

(11) Execute Change Plans

This is the beginning of the "Deploy" phase, and it's where you'll be taking action and executing the change management procedure and plans you developed during Phase 1. Deliver the change management plans that you put together in the sections above.

Read more: [Best Change Management Planning with Step-by-Step Workflow](#)

(12) Deploy Change Champions/Agents Network

A change champion network is a collection of selected individuals from groups that will be impacted by a change. A change champion network is a powerful part of any business process change management; it moves ownership of the change to the business units impacted by the change, which decreases end-user resistance and increases stakeholder buy-in.

Read more: [Launching and Managing a Change Network](#)

(13) Deploy Communications Plan

Push out the various communications to all groups you need to communicate with (leaders, stakeholders, sponsors, change champions, departments, etc.) according to the schedule you laid out on your change management task list.

As part of your communications plan, you should include a two-way communication strategy that involves both "Telling" and "Listening. Telling is communicating to people. Listening is hearing what these same people have to say.

Read more: [The Best Communication Plan for Change Practitioners](#)

(14) Conduct Coaching & Training

Provide the coaching that you identified during your change management process steps in Phase 1 (Assess). This may include coaching for your change agents and change champions, as well as coaching for managers to help them successfully implement necessary change management basics in their departments.

Read more: [The Best Coaching Plan for Coaching Managers & Employees](#)

(15) Manage and Resolve Resistance

You'll deploy your resistance management plan and related change management process steps which should include addressing resistance both proactively and reactively.

Read more: [The Best Guide for Managing Resistance to Change](#)

(16) Track and Measure Adoption

When it comes to tracking and measuring business process change management, including how employees, managers, or customers are adapting and transitioning through a change, there are two key areas that you need to focus on:

1. Change Management Adoption & Enablement KPIs
2. Change Metrics

Read more: [Change Adoption Metrics & Measurement](#)

(17) Resolve Adoption Roadblocks

After you go live, you'll have passed the unfreezing stage of change when you're helping people release old behaviors and replace them with new ones. But people can still revert to old behaviors if you're not actively addressing adoption roadblocks. You need to continue assessing and identifying resistance and then applying proactive and reactive mitigation plans to overcome resistance to change.

Read more: [Mitigating & Resolving Roadblocks to Change Adoption](#)

See also: [Reinforcing a Change](#)

(18) Follow-Up / Support Calls

This step in implementing change management is vital to ensuring sustained adoption of the change. It includes the following change management tasks:

- Follow up with trainees and managers to identify additional training needs
- Follow up with managers to identify post-deployment issues
- Work with necessary parties to resolve issues and roadblocks
- Conduct support calls, office hours, and post-go-live follow-up training

(19) Celebrate Successes

Celebrate quick wins and early successes:

- Constantly seek out evidence of progress in the project,
- Watch for the achievement of major milestones and identify early successes even if small.
- Organize ways to recognize groups and individuals that have achieved success. Make it public.
- Use normal staff meetings or regularly scheduled department meetings as an avenue for recognition of achievement.
- Ensure that key stakeholders are aware of these achievements and involve managers in the chain of command to award these recognitions.

(20) Hand Off Responsibilities

When a project comes to a close, the change management team will need to transition out of the project. This will be one of the last change management steps that you'll take before closing out the project.

Part of this transition needs to involve a transfer of responsibilities from the change management team to a designated group that will be determined by the program leads. A designated group might be a group within HR, Program Management Office, or some other group.

Read more: Change Management Team Transition

(21) Final Report & Lessons Learned

One of the most helpful change management exercises you can do at the close of a project is to meet with your change management group to review how the project went and document successes, room for improvement, and other lessons learned.

This information is invaluable when planning future change management activities for new change projects in the future.

Get a more detailed list of tasks and deliverables in our **free Change Management Workflow Template**. Learn more here.

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Read more at airiodion: https://www.airiodion.com/change-mgt-tasks-step-by-step/