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Change Management Success Checklist

This checklist is designed to help you evaluate and achieve Change Management Success. It provides step-by-step guidance to measure adoption, employee engagement, and business outcomes, ensuring sustainable transformation.

1. Define Success Metrics

- ☐ Establish clear KPIs such as adoption rate, ROI, engagement scores, or productivity gains.
- ☐ Ensure leadership alignment on what ‘success’ means for this initiative.
- ☐ Set time-bound milestones (e.g., 3-month, 6-month adoption targets).

2. Map Stakeholders and Readiness

- ☐ Identify all impacted groups (leaders, managers, frontline staff, customers).
- ☐ Assess readiness levels using surveys, interviews, or readiness assessments.
- ☐ Segment stakeholders into high-support, neutral, and resistant categories.

3. Measure Communication Effectiveness

- ☐ Track email open rates, town hall attendance, and intranet engagement.
- ☐ Test employee understanding of the ‘why’ behind the change.
- ☐ Collect feedback to identify communication gaps.

4. Track Adoption and Usage

- ☐ Monitor system logins, feature usage, or compliance rates.
- ☐ Compare adoption across departments or locations.

- ☐ Identify areas with low adoption and address barriers.

5. Evaluate Training and Support

- ☐ Review training completion rates and test results.
- ☐ Track support/help desk requests to identify gaps.
- ☐ Provide refresher training and just-in-time resources.

6. Link Change to Business Outcomes

- ☐ Compare pre- and post-change KPIs (efficiency, costs, customer satisfaction).
- ☐ Track measurable ROI from the initiative.
- ☐ Align business performance improvements with project goals.

7. Gather Continuous Feedback

- ☐ Run employee surveys at 30, 60, and 90 days post-launch.
- ☐ Conduct focus groups to collect detailed insights.
- ☐ Share how feedback is being used to refine the change.

8. Reinforce and Sustain Change

- ☐ Recognize and reward employees demonstrating new behaviors.
- ☐ Share success stories and highlight quick wins.
- ☐ Embed change into policies, goals, and performance measures.

9. Adjust and Improve Continuously

- ☐ Review adoption and performance metrics quarterly.
- ☐ Apply lessons learned to future initiatives.
- ☐ Update communication, training, and engagement strategies as needed.

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