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Checklist to Prepare for New Change Management Era

Become a Coach, Not Just a Communicator

- ☐ Develop your coaching skills: invest in training, practice active listening, ask powerful questions.
- ☐ Focus on Emotional Intelligence (EQ): build empathy, read cues, manage emotions effectively.
- ☐ Redefine your role: position yourself as a strategic partner and internal consultant.

Stand Up Portfolio-Level Change Management

- ☐ Map and inventory all active/planned changes across functions.
- ☐ Build a change heat map and capacity model to prevent overload.
- ☐ Create governance forums for prioritization and sequencing.

Adopt Agile, Iterative Ways of Working

- ☐ Run smaller, incremental change sprints with frequent retros.
- ☐ Maintain a prioritized change backlog and update regularly.
- ☐ Use feedback loops (pulse checks, beta groups) to adapt quickly.

Build Your AI & Analytics Stack

- ☐ Pilot AI sentiment analysis with privacy guardrails.
- ☐ Define adoption KPIs and track leading/lagging indicators.
- ☐ Create dashboards for leaders and teams to visualize adoption.

Design for Human-Centered Experience

- ☐ Assess change fatigue risks and develop mitigation plans.
- ☐ Segment stakeholders by personas and tailor engagement.
- ☐ Embed psychological safety and inclusion practices.

Enable Leaders as Change Agents

- ☐ Launch leader enablement programs and playbooks.
- ☐ Define visible leader behaviors to reinforce change.
- ☐ Establish coaching circles for leaders and managers.

Personalize at Scale with Digital Journeys

- ☐ Design role-based learning and adoption journeys.
- ☐ Modularize training and communication content.
- ☐ Automate nudges and reinforcement activities.

Master Remote & Hybrid Engagements

- ☐ Develop a virtual facilitation toolkit for online workshops.
- ☐ Use asynchronous rituals for updates and Q&A.
- ☐ Build a champions network across locations and time zones.

Measure What Matters & Tell the Story

- ☐ Set OKRs linked to adoption and business outcomes.
- ☐ Combine quantitative metrics with qualitative stories.

- ☐ Deliver monthly 'state of change' summaries.

Protect Yourself with a Personal System

- ☐ Timebox deep work and automate repetitive tasks.
- ☐ Maintain a library of reusable templates and tools.
- ☐ Set working agreements to manage scope and stakeholder requests.

Readiness Checklist

- ☐ Completed foundational coaching training.
- ☐ Change portfolio inventory created and heat map published.
- ☐ Agile change backlog and sprint cadence established.
- ☐ Adoption KPIs defined and dashboards live.
- ☐ Stakeholder personas and fatigue assessments completed.
- ☐ Leader playbook and coaching circles in place.
- ☐ Role-based adoption journeys mapped and nudges scheduled.
- ☐ Virtual facilitation toolkit and champions network active.
- ☐ OKRs tied to business outcomes; monthly reports shared.
- ☐ Personal system (SOPs, templates, automations) implemented.

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