The Rolling-Out-Change Checklist

*To accomplish a successful change-initiative, be **strategic and optimistically steadfast**.*

- ☐ Before you roll it out, **think through** as many details, obstacles, and options as possible.
  - o One of the greatest change-initiative frustrations for employees is when the leadership changes direction often during the process due to lack of strategic planning.
- ☐ Check your **personal feeling** about the change-initiative. If you are not on board yet and you are the messenger (not a decision maker), figure out some way to commit to the change before you address your team.
  - o Discrediting the leadership (i.e. "I don't know why they are making us do this") will degrade morale and trust.
- ☐ If possible, **seek input early** about the implementation of the change-initiative from those it will impact *before* the plan is solidified. **Brainstorm** possibilities together.
- ☐ During this entire process, **face time** is exponentially better than email.
- ☐ Do both: have a **guiding plan and be flexible** along the way.
- ☐ **Be honest**. Hidden agendas and lack of authenticity will destroy morale.
- ☐ Use **incentives** to reinforce change, but not demand it.
- ☐ **Share the benefits** of the change to the organization, their department, and to the individuals. Focus on the "why."
  - o Communicate the pain/problems of not changing now.
- ☐ Connect and communicate the need for this change to the **values and vision** of the organization and the individuals.
- ☐ **Communicate frequently** as appropriate to your situation.
  - o When asked, most employees want *more* information compared to less.
- ☐ Remember that there are multiple stages of change/transition, and many people will not be on board right away.
  - o Allow for the change-recipients to ask **questions, share their concerns**, and communicate with you. **Listen, be patient and validate** the perceived challenge, opposed to dismissing it.
- ☐ Once the change-initiative is solidified and communicated, allow as much **autonomy** in the "how" of reaching the change goals.
- ☐ Create **smaller goals** along the way toward the larger goal.
  - o **Celebrate successes** and milestones met.
- ☐ Recognize individuals who are accepting (or excelling with) the change and find ways for them to **mentor others**.
- ☐ Continuously **seek feedback and input** about the impact of the change-initiative along the way. At times, you may think "Suck it up! At least you have a job!" Instead, empathetically listen. The more you understand the concerns, the better you will be able to move forward.
  - o **Communicate about any feedback** that is being implemented.
- ☐ If you sense a lack of confidence or fear, optimistically **communicate your belief in them**.
- ☐ Support success with **technical trainings and resources** that will ease the transition.
- ☐ **Share what is not changing**.

Resources utilized to create this checklist:
Bridges, William and Susan Bridges. "Managing Transitions: Making the Most of Change." Hodder & Stoughton, Jan. 2017.
Collins, Jim. "Good to Great: Why Some Companies Make the Lead and Others Don't." Harper Collins, July 2010.
Grenny, Joseph, Kerry Patterson, David Maxfield, Ron McMillan, and Al Switzler. "Influencer: The New Science of Leading Change." Vital Smarts, LLC, 2014.
Kotter, John. "Leading Change." Harvard Business Review Press, Nov. 2012.
Nohria, Nitin, and Michael Beer. "Cracking the Code of Change." *Harvard Business Review*, Harvard Business School. May-June 2000. https://hbr.org/2000/05/cracking-the-code-of-change. Accessed 14 Nov. 2017.
Feedback from participants of Lancaster Consulting's Leadership Academies.

Notes: