

Gartner Strategy Leadership Council

# Checklist for Creating a Change Management Plan



Strategy leaders can use the following framework, implementation tools and templates to build a change management plan to support a major shift in enterprise strategy.

## Steps for building a change management plan

### 1. Lay the groundwork for the change management plan:

- Understand the components of the change and its impact on individuals and teams, as well as action steps that can support the change process.
- Identify whom to involve and partner with key stakeholders to understand the goal of the change and key differences associated with the future state.

### Associated Tools and Templates

- Action Step Identification Tool
- Change Impact Inventory
- Change Management Plan Presentation
- Change Management Planning Tool
- Change Ownership Assessment
- Employee Barrier Identification Tool
- Employee Segmentation Action Steps Identification Tool
- Gartner Project Manager
- Gartner Project Reviewer

## Pitfalls

### No Consideration of People

Organizations embark upon a major strategy change without understanding the full impact of the project on stakeholder groups and individuals.

### A Nice-to-Have, Not a Need-to-Have

Business stakeholders perceive change management as a nice-to-have, not a need-to-have investment. Therefore, they do not support all the change management steps and the result is an ineffective plan.

### Invisible Leadership Support

A lack of visible leadership support and involvement in change management can weaken organization-wide enthusiasm for change and slow its implementation.

### A One-Size-Fits-All Approach

Action steps developed for broad applicability across employee groups underestimate the unique needs of individuals and groups that should be considered to make change successful.

## Keys to success

### Invest in Understanding the Change

Invest time early in the process in conversations with leaders to understand the business context of the change and how it will impact people.

### Link Plan to Project Success

The change management plan should objectively present the relevant benefits and risks/downsides of the change management steps. It should also link the action steps to the business outcomes associated with project success.

### Secure Visible Leadership Support

Drive accountability by assigning leaders key steps to executing the change management plan, making their involvement and goals visible to the organization.

### Tailor Change Action Steps

Tailor change management action steps to reflect the needs of different employee groups and individuals.

## 2. Clarify the likely impact of the change:

- Work with senior BU/functional leaders to define the change objectives, business context and rationale. Establish consensus on how the change is aligned with the goals of the affected BUs and the enterprise as a whole.
- Break down the change into discrete components (such as new skills required, process changes and technology upgrades) to identify the employee groups whom the change will directly or indirectly affect.
- Assess the impact of the change on specific stakeholder groups and individuals.
- Create an employee working group to consult on the change management process by selecting a representative sample of employees whom the change will affect and who are likely to have a credible and informed opinion on the change. Work with the group to assess the impact of the change on various employee segments.
- Evaluate employee change fatigue risk by assessing the disruption and exertion employees will face in association with upcoming changes — not just the magnitude of the change itself.
- Partner with managers and the employee working group to identify barriers to change adoption by focusing on the two key drivers of employee performance during times of change — employees' commitment and capability.

Essential

Essential

## 3. Identify action steps to address challenges:

- Based on the risk factors and barriers to adoption identified in Step 2, identify action steps to make change easier for affected employees. Consolidate all change management action steps and map them to the stakeholder groups and individuals affected by each change component.
- Assess the specific costs and requirements of implementing the action steps as well as the anticipated results of taking these steps.
- Identify the leaders and managers who will implement various action steps based on their skills, role, importance in the organization and/or level of influence.

Essential

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## 4. Thoroughly document the change management plan:

- Identify metrics to evaluate the progress and long-term effectiveness of the change action steps, and identify lead metrics for the overall project (i.e., early milestones that demonstrate progress toward change initiative success).
- Document the timelines, ownership and success measures for each action step identified to create a detailed change management project plan.
- Prepare an executive-level presentation of the change management plan to secure leadership's support for it.

Essential

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## 5. Communicate and launch the change management plan:

- Engage identified change owners to prepare them to communicate the plan, educating them on the overall plan and how it supports both change initiative success and business outcomes.
- Help employees understand and own change by setting up workshops for them to discuss their emotional responses to change that transform their normal feelings of nervousness about change into a sense of control.
- Equip managers to communicate the change within their teams and to regularly monitor the impact of the change on their team's performance. Help them coach direct reports to identify opportunities for improvement and ways to cope effectively by learning from their peers in the employee working group.

## 6. Track key metrics associated with change implementation:

- Review how effectively the change management plan supported the outcome of the project. Periodically track key metrics identified to ensure the change is delivering on priorities, get feedback from key stakeholders and monitor execution risks and make course corrections.

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