

GUIDE

# Change Management Planner



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# *Intro* Change Management Planner

## VISUAL PLANNER FOR ORGANIZATIONAL CHANGE MANAGEMENT

Welcome to the Change Management Planner Guide! This guide is designed to help you navigate the complex process of managing organizational change. Whether you're leading a small team through a new initiative or steering an entire organization through a significant transformation, this planner provides a structured approach to ensure success.

Change management can be challenging, but with the right tools and strategies, you can effectively guide your organization through any transition. This planner incorporates best practices from various change management models to provide a comprehensive framework. However, it's essential to remember that this planner is not a one-size-fits-all model. Instead, it is a flexible tool that you can customize to fit the unique needs and culture of your organization.





## LEADERS

Leaders can leverage this planner to gain a comprehensive understanding of the key elements involved in managing organizational change. It serves as a practical guide, helping them to grasp the scope, necessary steps, and critical components required for successful change initiatives.

Additionally, this planner enables leaders to assess and evaluate the change plans presented to them, ensuring they are aligned with best practices and tailored to the organization's unique needs. By using this planner, leaders can confidently support and drive change, ensuring a structured and effective approach throughout the transition process.

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## CHANGE MANAGERS

Successfully managing organizational change requires careful planning, execution, and reinforcement. This Change Management planner provides a structured approach based on best practices from several change management models.

However, it's crucial to customize this plan to fit your unique organizational environment. Each organization is different, and what works for one may not work for another. By adapting these guidelines to your specific context, you can increase the likelihood of a smooth transition and achieve lasting success.



This Change  
Management Planner  
is built on the  
Goalscape platform.

For instruction videos  
on Goalscape, click  
[here](#).



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# Prepare and Plan



# Initial Preparation and Planning

The steps are detailed in the Planner but below are tips on how to customize for your organization.

<b>Scope and impact analysis</b>	Adapt the scope to reflect your organization's specific context and needs.
<b>Stakeholder analysis</b>	Consider the unique stakeholders in your environment and tailor your engagement strategies accordingly.
<b>Vision creation</b>	Ensure your vision reflects the values and aspirations of your organization.
<b>Sponsor assessment</b>	Tailor your sponsor engagement plan to match the leadership style and culture of your organization.
<b>Change readiness assessment</b>	Adapt your readiness assessment tools to fit your organizational context.
<b>Risk assessment</b>	Consider specific risks that are unique to your organization and industry.



# Prepare Change Management Team

The steps are detailed in the Planner but below are tips on how to customize for your organization.

<b>Team structure</b>	Structure your team to leverage the strengths and expertise of your organization's team members.
<b>Participants</b>	Choose individuals who understand the unique dynamics of your organization.
<b>Preparation and training</b>	Develop training programs that address challenges specific to your organization that the team might face.
<b>Metrics of success</b>	Define metrics that align with your organizational goals and objectives.



# Create a Change Plan

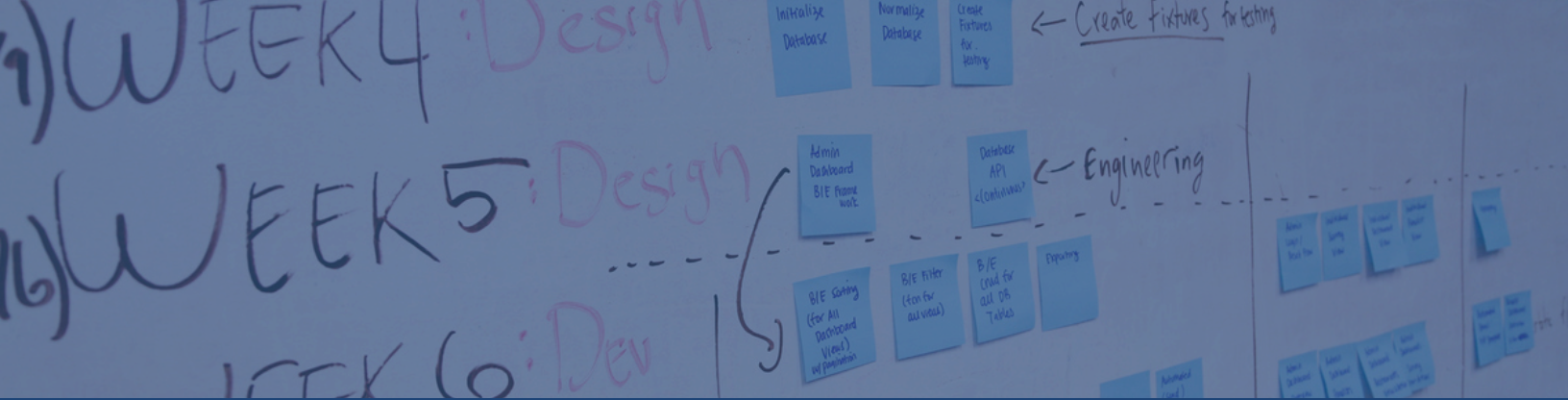
The steps are detailed in the Planner but below are tips on how to customize for your organization.

<b>Communication plan</b>	Use communication channels that are most effective within your organization.
<b>Training plan</b>	Align with HR so you can tailor the training to your organization's best practices.
<b>Support plan</b>	Offer support resources that address the unique challenges the organization's culture brings.
<b>Resistance management</b>	Review the organization's history to determine recurring resistance themes.
<b>Sponsor roadmap</b>	Adapt the sponsor roadmap to fit the leadership style of your organization's sponsors.



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# Execute and Manage



The steps are detailed in the Planner but below are tips on how to customize for your organization.

## EXECUTE CHANGE PLAN

<b>Execute all individual plans</b>	Adjust the execution steps as needed based on real-time feedback and conditions.
<b>Monitor barriers &amp; blockers</b>	Use monitoring tools that fit your organization's workflows.
<b>Progress reporting</b>	Develop reporting formats that are most effective for your stakeholders.

## MANAGE THE CHANGE TEAM

<b>Support, coaching, and developing</b>	Make sure that the resources offered fit into the organization's HR schemes.
<b>Wellness checks</b>	Implement wellness initiatives that resonate with your team's culture and preferences, and align with HR

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# Reinforce and Make it Stick



The steps are detailed in the Planner but below are tips on how to customize for your organization.

**Measure adoption rate**

**Measure success metrics**

**Celebrate success**

- Use measuring tools that fit into the organization's workflows. Leverage existing systems as much as possible.
- Consider the organization's cultural nuances and unique stakeholders.
- Use feedback to adjust to cultural preferences.



# In Closing

Successfully managing organizational change requires careful planning, execution, and reinforcement. This planner provides a structured approach based on best practices from several change management models. However, it's crucial to customize this plan to fit your unique organizational environment. Each organization is different, and what works for one may not work for another. By adapting these guidelines to your specific context, you can increase the likelihood of a smooth transition and achieve lasting success.

Remember, change is not a one-time event but an ongoing process. Stay flexible, seek feedback, and continuously improve your approach. Celebrate your successes along the way, and use them as a foundation for further growth and development. With this planner as your guide, you are well-equipped to lead your organization through the challenges and opportunities of change.



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