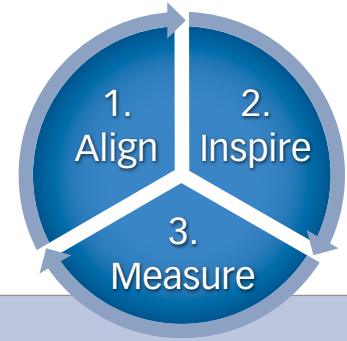


Change Plan Worksheet



Step 1: Align – Create a Vision and Establish a Sense of Urgency

Use the following space to create a vision for the team/organization or change effort.

A clear vision simplifies the endless detailed decisions.

Organization Vision:

What is your vision for your team/organization/change initiative?

Define the vision once execution happens (be a source of possibilities):

What becomes possible?

What are the benefits, and for whom?

What makes this exciting?

Check for the following:

Imaginable The vision conveys a clear picture of what the future will look like.

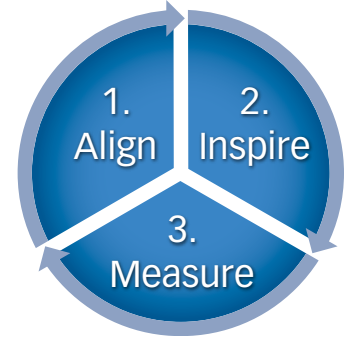
Desirable The vision appeals to the long-term interest of those who have a stake in the enterprise.

Feasible The vision contains realistic and attainable goals.

Flexible The vision allows individual initiative and alternative responses in light of changing conditions.

Communicable The vision is easy to communicate and can be explained quickly.

Change Plan Worksheet



Step 1: Align – Communicate the Vision
(Structured Messaging: Three Most Important Messages)

Use the following to articulate the three most important messages that will build commitment to the vision.

Identify up to three messages that communicate how the new way is superior to the old and the ideal future state:

1	
2	
3	

What are three ways in which the team members/employees will interact that are aligned with our values and enable us to achieve our vision?

1	
2	
3	

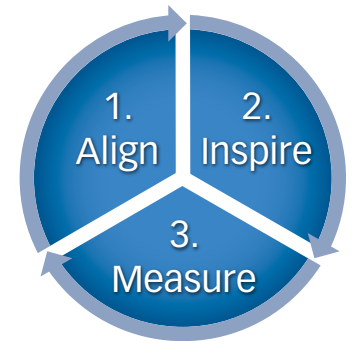
What are up to three things that anybody who joins your organization must be, know, and do?

1	
2	
3	

What are three ways to build your leadership bench and improve succession?

1	
2	
3	

Change Plan Worksheet



Step 1: Align—Communicate the Vision (Communication Plan)

Use the following to create a plan to communicate the vision. Use every vehicle possible to communicate the new vision and strategies for achieving it. Teach new behaviors by leading the way. **Pitfalls to avoid:** Under-communicating the vision; behaving in ways that do not model the vision.

Vehicle	Purpose/Content	Target Audience	Frequency

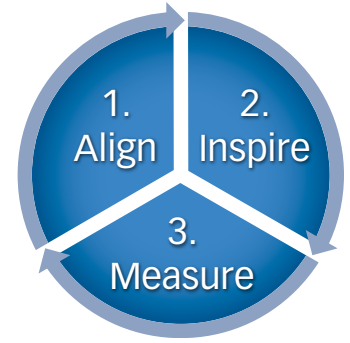
Examples:

Vehicles	Purpose	Content
Walking the halls	Acknowledge	Results
Teachable moments	Inform and update	Strategy
Brown bag lunches	Communicate goals and strategy	Goals
Town hall meeting	Share data	Initiatives
Executive meetings	Celebrate	Budget
Staff meetings	Give feedback	Knowledge
Off-site retreats	Collaborate	Values
One-on-one meetings	Get advice	Vision
Broadcast emails	Brainstorm ideas	Mission
Internet site	Track progress	Roles and accountability
Newsletter	Solve problems and improve	Standards and expectations
Inserts in pay stub	Learn and develop	Resources
Information systems	Socialize	Protocols
Formal reports	Review performance	Norms and behaviors
Blogs	Inspire and motivate	Requests for help, advice, support
Tweets	Apply pressure	
Facebook/social media	State expectations	
	Teach/train	
	Mentor	

Change Plan Worksheet

Step 2: Inspire People by Creating Short-term Wins and Through Recognition

Use the following to plan for and create short-term wins. Think about how you can design and engineer visible performance improvements that will generate momentum and excitement. Also consider a reward and recognition plan for employees who demonstrate the change vision and organizational values. **Pitfalls to avoid:** Leaving short-term successes up to chance; failing to score successes early enough.



Short-term Wins

Early Win	By When	Plan to Make it Happen	Who Makes it Happen

Reward and Recognition

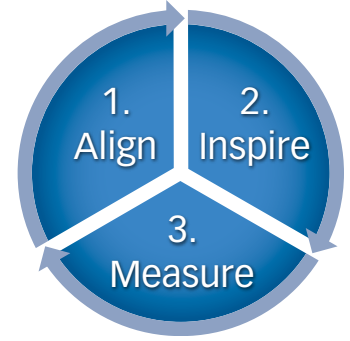
What We Need to Acknowledge	Who Needs to Be Acknowledged	How We Will Acknowledge	By When

Change Plan Worksheet

Step 3: Measure and Communicate Results

Use the following to create a plan to measure and communicate results.

Pitfalls to avoid: Lack of clarity of what successful change effort looks like.



What Will the Team Achieve?	By When?	Status			How Will We Communicate Progress?
		Complete	In Progress	Not Complete	
		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
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		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
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		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
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		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	

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