**Leading People through Change Worksheet**

**1. Identify who is being impacted by the change and how.**

**Purpose:**

When implementing change initiatives, leaders and managers can overlook elements of organizational change management (OCM) process. This can result in workplace dissatisfaction which could impede the organization’s ability to implement and sustain business transformation.

This worksheet is designed to assist change leaders or managers to consider the necessary factors when leading people through change. By answering the questions in this worksheet, leaders and managers will see strong areas and inadequacies throughout their organization in the change process.

Based on the answers, leaders and managers can develop appropriate strategy with steps for leading and engaging the hearts and minds of people through change. Leaders and managers can identify focus areas to develop a sense of urgency around the need for change, bring together a coalition or team of influential people whose power comes from a variety of sources, including job title, status, expertise, and political importance to champion change, communicate the need for change frequently and powerfully, and motivate people with quick wins early in the change process.

* Review your stakeholder analysis. Expand it in terms of how the change will affect each individual or group. What are their likely reactions?
* How will we engage each individual or group in checking our assumptions? What proactive steps can we take to respond to the reactions?

**2. Communicate, communicate, communicate…**

* What are the key messages that need to be sent out about the change?
* Who can help send the messages? How can we prepare them to play the role of communicators?
* How can the messages be sent? What methods will we use?
* How will we check to make sure the messages are received as intended?
* How will we “walk the talk” – ensure consistency between words and actions?

**3. Accept resistance and turn it into a useful process.**

* How will we identify resistance from individuals and groups?
* What are our strategies for engaging those who are resisting?
* What activities will we offer people to involve them in planning and implementation?

**4. Acknowledge, honor, and balance losses.**

* What are individuals and groups losing? How will we engage each individual and group in checking our assumptions and learning how to balance losses appropriately for each?
* How will we acknowledge and honor the losses? What kinds of recognition or celebration activities can we plan?
* What can be done to balance the losses for each individual and group?

**5. Promote creativity and risk-taking.**

* What opportunities now exist in which people can show creativity? What activities can we create to give people an opportunity to be creative?
* What are our strategies for encouraging responsible risk-taking?
* How will we handle mistakes? How will we monitor our own reactions to risk-taking and mistakes?
* How will we recognize and reward innovation?
* How will we anchor new ways of working in our day-to-day business?

**6. Demonstrate compassion and patience.**

* How will we prepare ourselves to deal with negative reactions?
* What are strategies for responding to emotional outbursts?
* How will we check to make sure that we are behaving sensitively?