Name of Change Initiative

Change Management Strategy

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| **A note about the template.** The strategy describes who the impacted stakeholders will be and how the change will impact them whether it be a small workgroup or organization wide. Capturing and reporting on these unique characteristics will help to inform change management plan and activities. The document helps the author to:* Describe the change
* Define the impacted stakeholder groups
* Identify tactics to consider minimizing the impact the change may have on those impacted
* Capture perceived benefits for the change, which will then inform key messages and communications planning activities

Please note:* Section headings are optional
* Blue boxes provide guidelines or suggestions for content
 |

# Project Summary

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| ***In this section consider defining****:** *The change*
* *The size of the change i.e., small (workgroup) or larger (enterprise wide)*
* *The type of change i.e., process, system*
* *The implementation timeframe*
* *Individuals who will be impacted by the change*
* *The number of people who will be impacted*
* *The roles and resources that exist for the initiative i.e., who is the sponsor, manager, training lead etc.*
 |

**Brief introduction of the change:**

*Provide a brief description of the change*

**Type of Change:**

*Define the type of change this will be. Ie, is this a change in process, change in system, change in location, mindset etc.*

**Implementation timeframe**

|  |  |
| --- | --- |
| Project initiation date: |  |
| Target implementation date: |  |

**Impacted stakeholder groups and estimated #’s:**

|  |  |
| --- | --- |
| Stakeholder group:  | # individuals impacted |
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**Project resources:**

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| --- | --- | --- |
| Role | Name | Is training needed? |
| Executive Sponsor |  |  |
| Primary Sponsor |  |  |
| Manager |  |  |
| Training Lead |  |  |
| Communication Lead |  |  |
| Change Lead |  |  |
| Subject Matter Expert(s) |  |  |
| Other? |  |  |
|  |  |  |

# Assessing Stakeholder Impact

## Perceived impact to stakeholder group

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| ***Note to user: Interviews with stakeholder groups will be valuable to effectively fill in the table that captures:*** * *The perceived impact the change will have*
* *The degree of impact by stakeholder group. This action will help refine and prioritize messaging and CM activities.*

*When completing the table, consider the following:** *What’s the best way to connect with the stakeholder groups to better understand the impact the change will have?*
* *How much change has the stakeholder group dealt with recently? To what degree are they experiencing change fatigue?*
* *Who are the early adopters I can lean on to champion initiative?*
* *Are there location challenges that need to be overcome? Will I need to adjust the implementation approach for locations beyond main campus?*
* *What support will be needed beyond implementation?*
* *What peaks and valleys are the stakeholder groups experiencing? Is there a preferred implementation time?*
 |

| Stakeholder Group(listed in order of impact, most to least) | Perceived impact to stakeholder group |
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## Perceived broad benefits to stakeholder group

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| *Define the benefits of the change addressing “What’s in it for me” question for impacted employees*  |

| Stakeholder Group | Perceived broad benefits |
| --- | --- |
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## Motivating and engaging stakeholders

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| *Special tactics are actions we can undertake to accomplish the Change Management strategies and increase project outcome success. Ideally, tactics will:** *Mitigate anticipated resistance*
* *Address historical or cultural barriers*
* *Address unique attributes of each stakeholder group*
* *Leverage key influencers*

*Use the table below to identifying points of resistance or barriers that may be encountered. For each barrier identified, consult the ‘strategy’ column for suggestions on how to address the concerns. Highlight the strategy that may work for your change initiative.*  |

| Potential Barrier | Rational | Proposed Strategy |
| --- | --- | --- |
| Inconvenience | Employees do not see the value in the change | * Build awareness of the change
* Promote benefits of the change
* Address what’s in it for me (WIIFM)
 |
| Changes to job roles and responsibilities | Employee peers, and managers resist administrative and technological changes that result in their role being changed, eliminated or reduced | * Acknowledge concerns
* Communicate frequently and clearly
* Consult with HRP early and continue beyond implementation
* Provide training opportunities (if applicable)
 |
| Absence of reward system | Rewards for adopting the change are absent | * Identify rewards.
* Where $ rewards are not possible, consider intrinsic rewards
* Celebrate successes
 |
| Fear of the unknown | Employees are not involved / engaged in informing the change | * Engage employees
* Build awareness
* Minimize rumors
* Offer two-way feedback communication
* Identify SME’s or early change adopters to promote change
 |
| Peer pressure | Employees protect their work groups | * Communicate frequently and clearly
* Leverage sponsors
* Engage managers
* Dispel myths
* Consider how font-line employees may react
 |
| Trust | Low level of trust with past experience with change initiatives. Possibly due to lack of transparency / accountability or poorly managed projects | * Create a climate of trust
* Focus attentions on re-building trust where needed
* Engage managers
 |
| Fear of failure | Employee(s) doubt abilities to perform duties | * Communicate change
* Provide training and opportunity to test Build confidence
 |
| Implementation | Changes are introduced in an insensitive manner or timing is not appropriate | * Understand and minimize impact to stakeholder groups.
* Consult with stakeholders re preferred implementation dates
 |

# Communication

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| **In this section consider**:* *Identify preferred communication channels, ideally allowing for 2-way open feedback*
* *Defining the key messages by stakeholder group. Message content to focus on the: What, Why, When, How and What’s in it for me. In addition, information updates, reference to milestones achieved etc.*
* *Defining who the appropriate sender for each communication will be*
* *Identify target communication dates*
 |

## Available channels

| Channel | Audience | Suitable channel? (Yes/No) |
| --- | --- | --- |
| Memos and mass emails | Various |  |
| MS Teams | Various |  |
| Daily Bulletin | All of campus |  |
| Dedicated project website | All of campus |  |
| Social media | Various |  |
| Campus digital screens | Various |  |
| Print Materials | Various |  |
| Survey | Various |  |
| Lunch ‘n Learns / Training Sessions  | All of campus |  |
| Senior leadership meetings | Campus directors and senior leaders |  |
| Department meetings | Various |  |
| Team meetings | Various |  |
| Campus committees | Various |  |
| Administrative & technical support staff | Various |  |
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## Key messages

| Stakeholder group | Key message |
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## Change targets / timelines

| Target Date | Target stakeholder group | Target channel | Target content | Sender |
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# Next steps

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| *Capture a high-level list of pre- and post-implementation actions that will increase adoption of the change.*  |

## Pre-implementation

Date: Month, Year to Month, Year

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| --- | --- |
| Target date | Action |
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## Implementation and post-implementation

Date: Month, Year to Month, Year

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| --- | --- |
| Target date | Action |
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# Revision History

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| --- | --- | --- | --- | --- |
| Change Made By | Date Change Made | Details of Change | Change Reviewed/ Approved by | Date change reviewed/ approved |
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