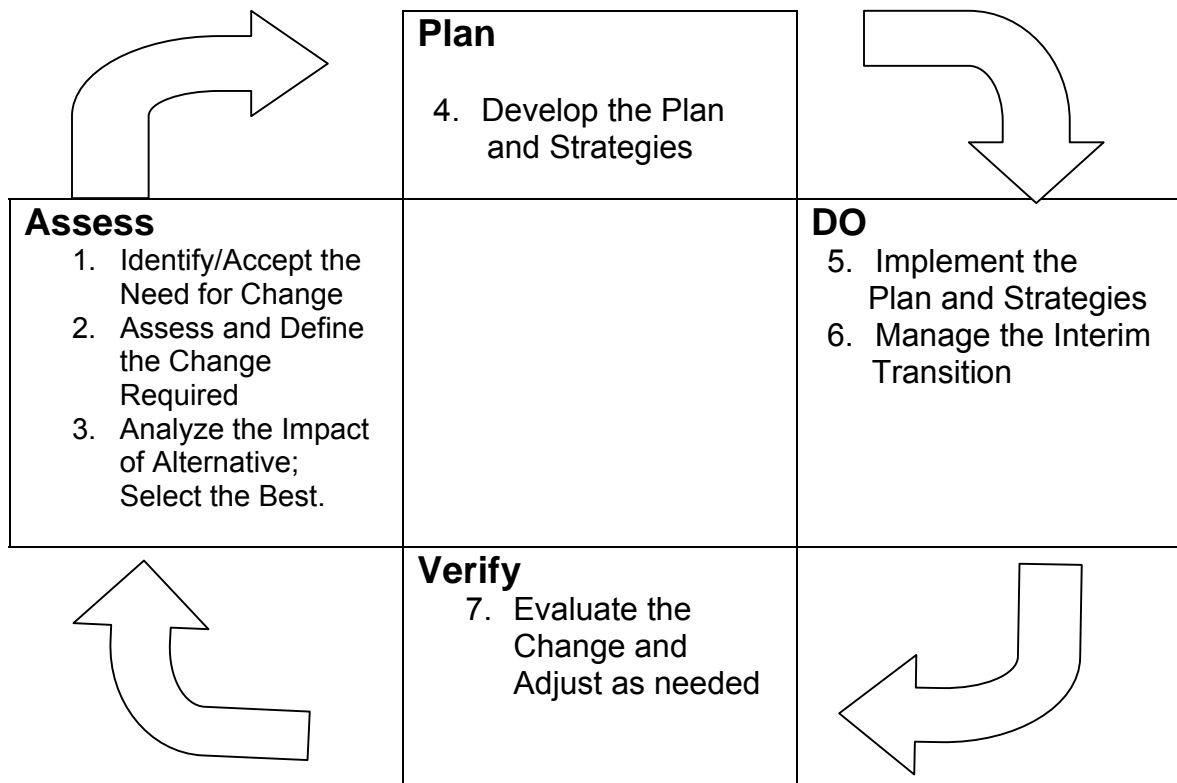




Steps & Tools for Managing Change and Transition

- What:** This tool will help you identify the steps to take in managing change and transition.
- Why:** As a change leader, it helps to take an organized approach to organizational change. These steps and tools can help you organize how you will approach your change mandate.
- When:** Use this model when you need to manage change in your area of responsibility.
- How:** Use the model to help you **ASSESS, PLAN, DO** and **VERIFY** during change and transition.

Each of these steps are linked to tools that you can use to plan and implement for change. Review the steps and choose the most appropriate tools. These steps are grouped according to the “Assess, Plan, Do & Verify” cycle as shown on the following pages.



Process for Managing Change and Transition

	STEPS	TOOLS
Assess	<ol style="list-style-type: none"> 1. Identify/Accept the Need for Change: <ul style="list-style-type: none"> • List the issues, indicators or symptoms • Ask stakeholders to confirm the issues indicators or symptoms • Decide whether change is necessary • Set up change team(s)/support mechanisms (implementation, transition, communication etc.) • Clarify Roles (Sponsor, Implementer, Agent, Advocate) 2. Assess and Define the Change Required: <ul style="list-style-type: none"> • Identify the preferred future • Assess the current state • Identify the gap or difference • Clearly define what must be changed • Establish measures of success 3. Analyze the impact of Alternatives: Select the Best <ul style="list-style-type: none"> • List reasonable alternatives (including making no change) • Assess the cost/benefits, pros/cons, outcomes vs. risks and potential side effects • Choose the best alternative • Identify restraining and supporting forces (i.e. people, events, rules and policies). 	<ul style="list-style-type: none"> • Change Leader Profile • Current Reality/Desired Future • Developing a Shared Vision • Clarifying Roles for Successful Change • Change Implementers – Questions to ask Sponsors • Gathering Information

	STEPS	TOOLS
Plan	<p>4. Develop the Plan and Strategies</p> <ul style="list-style-type: none"> • Explain the Change and Rationale • Describe the Current Situation vs. the Desired Future • Explain the Options Considered and Decision • Objectives, Action plans, and Measures of Success • Develop Strategies <ul style="list-style-type: none"> • Operational (Physical/ Plant, Legal, Financial, and Service Issues) • Human Resource (HR/LR, Staff Transfer, Training) Communication • Transition • Training and Learning • Team Development • Budget Implications 	<ul style="list-style-type: none"> • Creating a Change Plan • Strategic Communication During Change • Understanding People’s Response to Change • Type and Change • Developing a Learning Plan

<p>Do</p>	<p>3. Implement the Plan and Strategies</p> <ul style="list-style-type: none"> • Enlist Others • Determine readiness for change • Prepare and educate those implementing the change • Follow the timetable and sequence of events for the various strategies (i.e. communication, training, team development etc.) <p>4. Manage the Interim/Transition</p> <ul style="list-style-type: none"> • Monitor transition issues and people’s response to the change • Implement strategies to help people with the transition <p>Recognize results</p>	<ul style="list-style-type: none"> • Gathering Information • Managing Change – Announcing and Explaining the Change • Enlisting Others • Handling Resistance • Strategies to Help People During Transition • Giving Recognition
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	STEPS	TOOLS
Verify	5. Evaluate the Change <ul style="list-style-type: none"> • Monitor progress and debrief • Design and conduct evaluation based on the measure of success • Document and report on the outcome • Adjust or alter based on evaluation 	<ul style="list-style-type: none"> • Gathering Information • Managing Change • Strategies to Help People During Transition • Giving Recognition