

An overhead view of five business women sitting on a red and grey modular sofa in a meeting room. They are looking at documents, a tablet, and a laptop. A small table in front of them holds a laptop, a smartphone, and a notebook.

CHANGE MANAGEMENT TOOLKIT

Body

INTEGRATING CHANGE READINESS

This Change Management Toolkit is part of its Change Management Training Program. Use is authorised for those who have undertaken this Program. Only authorised users may print this material. Unauthorised use is prohibited.

www.thechange gym.com

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PROCESS STEPS

01 TOWARDS AWARENESS

02 TOWARDS COMMITMENT

03 TOWARDS PREPARATION

04 TOWARDS MASTERY

05 TOWARDS NORMALITY

Introduction to the toolkit

Welcome to your Change Management Toolkit – a comprehensive, hands-on guide designed to support you throughout your change journey. This document is structured around the proven five-step process to successfully manage change, integrating both personal change fitness and organisational change readiness.

Each section offers practical tasks, reflective questions, and interactive templates that empower you to progress at your own pace. Whether you're a seasoned leader or new to change management, the toolkit provides clear instructions and tools to help you diagnose challenges, create robust plans, and foster a resilient, agile environment.

Dive in and start transforming your approach to change – your journey towards creating meaningful, lasting transformation begins here.





Introduction

OVERVIEW OF THE CHANGE MANAGEMENT MODEL

This section explains the foundation of The Change Gym's approach to managing change. It's based on the well-known Transtheoretical Model of Change, which highlights that successful change happens through five distinct steps.

The Five Key Steps

1. Towards Awareness:

- People might not even realise a problem exists or see an opportunity for change.
- The goal at this step is to help everyone understand why change is needed by highlighting issues or opportunities.

2. Towards Commitment:

- Once people recognise the need, they must begin to commit to the change.
- This step involves evaluating the benefits of change and deciding to support it, despite any concerns.

3. Towards Preparation:

- After committing, stakeholders make a concrete decision to act and start preparing.
- Tasks include gathering resources, planning actions, and getting ready for new behaviours.

4. Towards Mastery:

- Here, people start to learn and practise the new ways of working.
- It's normal to face challenges or even slip up along the way. The focus is on building proficiency and confidence.

5. Towards Normality:

- The final step is when the new behaviours become the standard way of doing things.
- True success is reached when these new practices are fully integrated and become part of your everyday routine.

Roadmap of the Change Process

STEP 1
TOWARDS AWARENESS

STEP 2
TOWARDS COMMITMENT

STEP 3
TOWARDS PREPARATION

STEP 4
TOWARDS MASTERY

STEP 5
TOWARDS NORMALITY

01

STEP 1



WHAT TO DO IN STEP 1

QUESTIONS TO ASK

- **What current practices or obstacles are holding us back?** Identify any behaviours or processes that are impeding our progress.
- **Which missed opportunities or issues do you notice on a day-to-day basis?** Consider both the risks and the untapped potential that may be affecting performance.
- **How are these challenges impacting our overall performance and outcomes?** Reflect on the direct and indirect effects these issues have on our team's work and results.
- **If these obstacles were removed, what improvements would you expect to see?** Visualise the positive changes that could result from addressing these issues.
- **What experiences have you had that highlight the need for change in this area?** Share personal insights or examples that demonstrate the problem's significance.
- **What might be the long-term consequences if we continue with the current approach?** Consider the potential impact of inaction on our future success.
- **How does resolving these issues align with our overarching vision and strategic goals?** Connect the awareness of these challenges to the benefits of achieving our broader objectives.

Prompt critical thinking and encourage everyone to recognise why change is essential. By focusing on the problems and the opportunities, you'll be better positioned to build a solid foundation for commitment and further preparation in the change process.



**BUILDING AWARENESS IS A
PROCESS YOU CAN
CONTROL**

Provide Context 1

GATHERING THE INFORMATION

Identify Key Sources:

- Review existing reports, performance metrics, and relevant project data.
- Conduct interviews or surveys with team members, stakeholders, and subject matter experts to collect firsthand insights.
- Consult meeting notes, previous change initiatives, and market research to get a comprehensive view of the current situation.

Document Everything:

- Use a digital note-taking tool or spreadsheet to record all the information you collect.
- Include details such as the rationale behind the change, potential challenges, opportunities, and any relevant historical data.

ORGANISING THE INFORMATION

Compile and Group:

- Once all the data is gathered, compile it into a single document or table.
- Group the information into logical categories, such as background context, identified problems, opportunities, and potential impacts on performance.

Prioritise with a Ranking System:

- For each piece of information, assign a priority ranking (e.g., High, Medium, Low) based on its importance and urgency.
- Use headings, colour coding, or separate sections to clearly delineate these priorities. For example, a table might have columns for “Topic,” “Details,” and “Priority (HI, MID, LO).”

Create a Visual Summary:

- Consider designing simple infographics, flowcharts, or bullet-point summaries that visually represent the key points. Tools such as Canva can be effective for this purpose.



Provide Context 2

DELIVERING THE INFORMATION

Tailor Your Presentation:

- Choose the right delivery method based on your audience—this could be a formal presentation, a written report, or an interactive workshop.
- Ensure that the delivery format aligns with the communication preferences of your stakeholders. For example, senior management might prefer a concise PowerPoint briefing, while teams might benefit from a detailed workshop or an interactive PDF.

Contextualise Your Message:

- Begin with an overview that explains why the project is necessary and how the information aligns with the broader change initiative.
- Use real-life examples or case studies to illustrate the current issues and highlight the benefits of addressing them.

Engage and Invite Feedback:

- Allow time for questions and discussion to ensure the information is well understood and to gather additional input from stakeholders.
- Consider using digital tools (interactive slides or surveys) to capture real-time feedback and iteratively refine the information as needed.

Following these steps will help you provide clear, contextual information that effectively supports your change initiative, ensuring that all stakeholders are informed, engaged, and ready to move forward.

Identify Problems/Opportunities

Analyse the Current Situation:

- Review performance data, customer feedback, market trends, and internal processes. Use tools like SWOT or PESTLE analyses to uncover underlying issues or potential opportunities that the change project should address.

Engage Key Stakeholders:

- Conduct interviews, surveys, or focus groups with those who are impacted or influential in the change process. Their insights will help validate your findings and ensure that no critical problem or opportunity is overlooked.

Define the Scope:

- Clearly outline which problems or opportunities your project targets. Document the specifics, whether they are inefficiencies in processes, emerging market trends, or areas where the organisation can innovate and improve.

Develop Clear Messaging:

- Create compelling, easy-to-understand narratives that explain the identified issues or opportunities. Tailor the message for different stakeholder groups so that they see how the change project directly impacts their roles or benefits the organisation.

Implement Awareness Strategies:

- Use a mix of communication channels—presentations, workshops, newsletters, or one-to-one meetings—to share your findings and the proposed strategy. Encourage open dialogue so stakeholders can ask questions, provide feedback, and feel involved in the change process.



Ensure that the change project is built on a solid understanding of relevant problems or opportunities, and all stakeholders become fully aware and engaged with the need for the change.

Target Relevant Stakeholders

Identify Stakeholders:

- Start by listing all individuals, groups, or organisations who may be affected by or can impact the change opportunity. This includes internal teams, external partners, customers, and other stakeholders whose input or buy-in is crucial.

Analyse Their Roles and Influence:

- Evaluate each stakeholder based on factors such as:
 - **Impact:** How significantly will the change affect them?
 - **Involvement:** How much do they need to be engaged or can they contribute to implementing the change?
 - **Influence:** What is their power to support or resist the change?

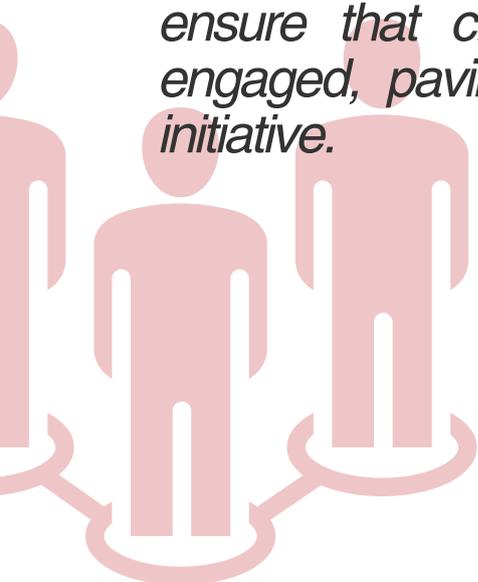
Rank Stakeholders:

- Organise them into tiers by ranking their level of involvement or impact. For example, create categories such as high, medium, and low priority. Those in the high-priority group are key players who must be actively engaged throughout the process, while those in lower tiers may need timely updates.

Develop Targeted Communication Plans:

- Tailor your messaging and engagement strategies for each group. High-priority stakeholders might require regular briefings and involvement in decision-making, whereas others might receive periodic updates.

By identifying, analysing, and ranking stakeholders, you ensure that critical voices are heard and appropriately engaged, paving the way for a more successful change initiative.



Utilise Media



Staff Meetings:

- Regularly convene group sessions to discuss the vision and rationale behind the change.

Emails/Newsletters:

- Use targeted emails or newsletters to share updates, key messages, and success stories.

Team or Group Meetings:

- Facilitate smaller, interactive sessions where specific groups can ask questions and provide feedback.

One-to-One Conversations:

- Have personalised discussions to address unique concerns and ensure individual buy-in.

PowerPoint Presentations:

- Create clear, compelling presentations that outline the problems, opportunities, and the need for change.

Videos:

- Develop engaging videos that explain the change, share stories, and highlight how the new approaches will benefit everyone.

Posters and Visual Materials:

- Display visuals around the workplace that reinforce the change messages and serve as constant reminders.

Social Media or Intranet Posts:

- If applicable, use internal social platforms or the company intranet to broaden reach and encourage interaction.

By utilising a variety of media, you can reach different stakeholder groups effectively and ensure that everyone understands and supports the need for change.

Develop Metrics

Define Core Messages:

- Clearly articulate the key information that explains why change is necessary. Identify the main challenges, opportunities, and benefits that your audience needs to understand. This establishes a baseline of what “awareness” should look like for all stakeholders.

Quantitative Metrics:

- **Surveys & Knowledge Checks:** Develop a set of focused questions—using multiple-choice or Likert scales—that test how well stakeholders grasp the reasons for change. For example, ask, “How clear are you about the challenges that necessitate this change?”
- **Digital Engagement:** Monitor metrics like email open rates, views on change-related intranet pages, and participation rates at informational sessions. These numbers serve as proxies for the amount of attention the change message is receiving.

Qualitative Feedback:

- **Focus Groups and Interviews:** Facilitate small group discussions or one-on-one interviews to gain a deeper understanding of stakeholders’ perspectives. Ask open-ended questions that encourage them to share their take on why change is needed.
- **Real-time Feedback Tools:** Use interactive tools during presentations, such as live polls or digital whiteboards, to gather immediate insights and spot any misconceptions.

Organise and Monitor the Data:

- **Dashboard Creation:** Consolidate survey results, engagement figures, and feedback into a single dashboard. This visual summary makes it easier to track progress over time.
- **Set Benchmarks:** Define clear targets (e.g., aim for 70% of stakeholders to demonstrate a high level of awareness) and review your metrics periodically. You can adjust your communications strategy based on these insights if awareness levels are below expectations.

Blend quantitative metrics with qualitative insights to get a well-rounded picture of stakeholder awareness, allowing you to adjust the strategy as needed.

Provide Context

Provide stakeholders with information to contextualise an impending change project. Write down all the information you need to give them. Then, rank them according to the importance of this information (HI, MID, LO)

CONTEXTUAL INFORMATION	HI	MID	LO



Identify Problems or Opportunities

What problems/opportunities does this change project target? What strategies will you use to help stakeholders build awareness of these? List them in the table below. Possible strategies are focus groups, interviews, discussions, and surveys.

PROBLEMS/OPPORTUNITIES	AWARENESS STRATEGIES

Target Relevant Stakeholders

Who are the stakeholders that should be made aware of these problems/opportunities?
Rank them in terms of their level of involvement or impact (i.e., some people will be more involved or impacted than others).

STAKEHOLDERS	INVOLVEMENT/IMPACT		
	HI	MID	LO

Utilise Media

What media will you use to build awareness of the need for change? Please make a list of them below. Possible suggestions include staff meetings, emails, team or group meetings, one-on-one conversations, PowerPoint presentations, videos, posters, and visual materials.



Media	Who Prepares?	By When?

02

STEP 2



WHAT TO DO IN STEP 2

QUESTIONS TO ASK

- **What benefits can we expect if we implement this change?** Consider both immediate improvements and long-term benefits, such as increased efficiency or cost savings.
- **How valuable are these benefits to our organisation?** Reflect on how these benefits align with strategic goals and overall success.
- **How urgently do we need to achieve these benefits?** Consider whether immediate action is required or if benefits can be pursued over time.
- **What risks do we face if we do nothing?** Identify potential downsides of maintaining the status quo, such as lost opportunities or declining performance.
- **How might this change affect our service delivery?** Evaluate potential disruptions or improvements for customers and operations.
- **What are our biggest concerns or fears about this change?** List anxieties such as resource gaps, resistance to change, or unforeseen challenges.
- **Have we attempted a similar change before?** Review past attempts for lessons learned and areas for improvement.
- **How challenging do we expect this change to be?** Consider complexity, required resources, and process shifts involved.
- **What obstacles might we encounter during the change process?** Identify potential internal and external barriers that could impede progress.
- **How long might it take to complete this change?** Estimate a timeline that covers planning, implementation, and stabilisation.
- **Are we equipped to succeed?** Consider whether our current skills, resources, and experience position us well for this change.
- **What are our key strengths and limitations?** Identify the capabilities we can leverage and the gaps we need to address.
- **What additional support is necessary?** Think about what extra resources, training, or external help we may require to succeed.
- **Will we receive the necessary support?** Evaluate if our current network, leadership, and systems are likely to provide the backing needed.
- **Are we prepared to back this change fully?** Reflect on our commitment and willingness to embrace and drive the change process.

Provide a clear framework for evaluating the change, striking a balance between opportunities and challenges.



**GUIDE YOUR TEAM
TOWARDS COMMITMENT**

Identify the Benefits and Value of Change

Facilitate Brainstorming Sessions:

- Organise small group workshops where participants are invited to list all potential benefits, both tangible and intangible. Use Post-it notes or digital brainstorming tools to capture ideas, then group and discuss common themes.

Use Structured Templates:

- Provide a simple worksheet that asks stakeholders to detail expected benefits (e.g., increased efficiency, cost savings, improved morale) and assign a perceived value to each. This helps everyone organise their thoughts and rate what's most impactful.

Encourage Personal Reflection:

- Ask individuals to reflect on past changes that produced positive outcomes. Have them write down what worked well and how those benefits might extend to the current situation.

Share Case Studies and Examples:

- Present examples of similar change initiatives and highlight the positive outcomes achieved. This real-world context can spark ideas about potential benefits and help illustrate value in action.

Interactive Discussion and Feedback:

- Use real-time polls or online surveys during meetings to collect immediate feedback on the perceived benefits of change. Then, discuss the results as a team to build consensus on what matters most.

Link Benefits to Strategic Goals:

- Ask participants how these benefits align with the organisation's overall vision and strategic objectives. Highlighting this connection can clarify the value of change and motivate commitment.

Engage stakeholders in actively identifying and evaluating the benefits and value of change, ensuring a comprehensive and aligned perspective.

Align the Change with the Vision

Vision Board Workshops:

- Have groups create vision boards using images, words, and symbols that represent the organisation's future state. Encourage participants to reflect on how the change connects with the overall vision and to explain the meaning behind their choices.

Storytelling and Future Scenarios:

- Ask team members to share stories from past successes and imagine future scenarios where the change has positively shaped the organisation. This helps everyone see the tangible impact of the change and how it aligns with long-term objectives.

Group Discussions on Values and Goals:

- Conduct structured discussions or workshops where stakeholders identify core organisational values and link them to the change initiatives. Use guided questions to prompt reflection on how the change supports these values and contributes to shared goals.

Backcasting Exercises:

- Start with a clear picture of the desired future and work backward to identify the steps needed to get there. This reverse planning method helps teams understand how current changes pave the way for achieving their vision.

Interactive Alignment Mapping:

- Create a visual "roadmap" or alignment chart where teams map out how each element of the change aligns with strategic objectives. This encourages stakeholders to visually connect the dots between their actions, organisational values, and the future vision.

Engage team members in exploring the connection between the change initiative and the overarching vision, ensuring everyone comprehends and embraces the path forward.

Create a Sense of Urgency

Communicate the Critical Need:

- Explain why standing still is risky. Share clear data, market trends, or internal performance gaps that point to the potential consequences of doing nothing. This could include customer dissatisfaction, falling behind competitors, or missed financial opportunities.

Tell a Compelling Story:

- Use storytelling to illustrate the impact of the current situation. Share personal experiences or case studies that show how the status quo is unsustainable. A narrative that connects the dots—highlighting both the risks of inaction and the potential rewards—helps people understand the stakes.

Set Clear Deadlines and Milestones:

- Create momentum with time-bound goals. Define when key outcomes should be met and use these deadlines to emphasise priority. This helps transform change from a distant concept into a pressing need.

Engage Key Stakeholders:

- Involve influential team members early in the process. When respected colleagues and leaders champion the change, their enthusiasm can spill over to others. Interactive sessions, such as workshops or open forums, where ideas and concerns are discussed openly, can also help reinforce the sense of urgency.

Highlight the Benefits of Immediate Action:

- Clearly articulate what's at stake and how change will lead to tangible improvements. Connect these benefits directly with the organisation's strategic goals, demonstrating that the future envisioned is within reach if the change is embraced quickly.

Use Honest, Transparent Communication:

- Avoid overhyping the urgency with manufactured pressure. Instead, present the realities candidly. Staff will be more motivated if they believe the urgency reflects genuine challenges rather than a top-down mandate.

Build the momentum necessary for change and motivate everyone to move forward with a shared sense of purpose and immediate urgency.

Identify Potential Risks and Anxieties

Facilitated Brainstorming Sessions:

- Organise workshops or informal meetings where team members can freely share their concerns. Use whiteboards or sticky notes to capture every risk or anxiety without judgment, then group similar issues together.

Risk Mapping Exercises:

- Guide participants through a structured risk mapping activity where they list potential challenges and rank them by likelihood and impact. This visual process helps everyone see which risks are most critical.

Scenario Analysis:

- Develop “what if” scenarios that explore worst-case outcomes. Ask participants to describe what might happen if a change goes wrong and to suggest preventive measures. This method not only surfaces concerns but also spurs constructive solutions.

Focus Groups and Interviews:

- Conduct small-group discussions or individual interviews with stakeholders to delve into personal experiences and apprehensions about change. This can uncover risks that might not emerge in larger meetings.

Anonymous Feedback Tools:

- Utilise digital tools or suggestion boxes that allow team members to submit concerns anonymously. This approach can be highly effective in revealing anxieties that people might be hesitant to share openly.

Role-Playing Exercises:

- Use role-playing to simulate parts of the change process. By acting out potential challenges, participants can more effectively articulate the risks and anxieties they feel and explore practical solutions in a safe and supportive environment.

Create an environment where everyone is encouraged to speak openly about potential risks and anxieties.



Be Realistic

Review Past Data:

- Encourage stakeholders to study objective metrics, case studies, and lessons from previous initiatives. This builds a factual foundation for understanding both opportunities and limitations.

Organise Structured Workshops:

- Facilitate sessions where participants discuss capacities, realistic timelines, and main challenges. Tools like risk mapping or SWOT analysis help ground these discussions in reality.

Set Measurable Benchmarks:

- Break the change process into phases with clear milestones. This makes progress tangible and helps highlight areas needing extra support.

Foster Candid Feedback:

- Create a safe space for honest dialogue about potential obstacles through open discussions or anonymous feedback channels.

Communicate Trade-Offs:

- Clearly outline the balance between optimism and caution, emphasising that change brings benefits but also requires overcoming real challenges.

Highlight Real-World Examples:

- Bring in examples of teams or leaders who navigated similar changes effectively. Their experiences can illustrate practical target-setting and problem-solving.

Encourage stakeholders to maintain a balanced perspective, acknowledging both the substantial benefits of change and the genuine challenges it presents.

Build Confidence



Highlight Past Successes:

- Remind your team of previous successful change initiatives. Share concrete examples and data to show that challenges have been overcome before, reinforcing that they can succeed again.

Communicate Strengths Regularly:

- Send consistent and specific messages about the group's current skills and resources. Use regular updates, team meetings, or newsletters to spotlight individual and collective successes that demonstrate your capability to handle upcoming challenges.

Provide Clear Guidance and Resources:

- Ensure everyone knows what to expect and has the tools they need. Structured training sessions, step-by-step guides, and accessible support channels can reduce uncertainty and boost confidence in navigating change.

Encourage Peer Support and Mentoring:

- Facilitate opportunities for team members to share experiences and advice. Pairing individuals with mentors or creating forums for open discussion enables people to learn from one another and build collective confidence.

Set Achievable Milestones:

- Break the change process into smaller, manageable steps with clear, measurable targets. Celebrating these milestones not only provides a sense of progress but also reinforces the belief that success is within reach.

Reinforce the group's ability to succeed, gradually building a more confident and change-ready mindset.

Ensure Support

Establish Open Communication:

- Create clear, two-way channels for sharing updates and addressing concerns at every stage.
- Regular meetings, town halls, and digital forums help keep everyone informed and engaged.

Provide Comprehensive Training and Resources:

- Offer targeted training sessions, user guides, and practical workshops to equip stakeholders with the needed skills.
- Develop a central repository of resources to ensure that everyone has access to information and tools throughout the transition.

Designate Change Champions:

- Identify influential team members who can advocate for the change, offer peer support, and address doubts. Ensure they are people with high levels of change fitness.
- These champions act as role models, demonstrating commitment while providing hands-on assistance during the process.

Implement Feedback Mechanisms:

- Set up channels for regular, honest feedback, such as surveys, focus groups, or one-on-one check-ins, to gauge support levels and address issues quickly.
- Act on feedback to fine-tune the change process and reinforce that everyone's input is valued.

Visible Leadership Support:

- Ensure leaders and senior managers consistently back the change by participating in training sessions and visibly endorsing new initiatives.
- Their active involvement reassures stakeholders that they are not navigating the change alone.

Create an environment of continuous support, fostering a strong commitment to the change at all stages of the process.

Seek a Firm Decision



Clarify the Rationale:

- Clearly articulate why the change is needed, using data and real-life examples. When stakeholders see a well-supported rationale, they're more likely to commit.

Present Clear Options:

- Lay out specific choices and the consequences of each option. This could involve outlining a "go" versus "no-go" scenario or detailing different levels of commitment. Clear alternatives help stakeholders understand what is at stake and make more informed decisions.

Facilitate Open Discussion:

- Organise meetings or workshops where everyone can ask questions, air concerns, and discuss the change. This dialogue helps eliminate doubts and builds trust, paving the way for a confident decision.

Use Decision-Making Tools:

- Implement tools like voting, commitment checklists, or digital surveys that require an explicit "yes" or "no" response. A formal process not only documents the commitment but also signals that the decision is final and binding.

Secure Visible Endorsements:

- Encourage key influencers and leaders within the group to publicly support the change. Their commitment can motivate others to follow suit, lending additional weight to the decision process.

By combining clear communication, structured options, candid discussions, and formal decision-making tools, you can guide stakeholders toward making a firm, visible commitment to change.

Use Metrics

Survey and Vote Metrics:

- Create a structured survey or voting tool specifically designed to record each stakeholder's decision. Track the percentage of responses that commit versus those that are undecided or opposed. This quantitative metric tells you whether a critical mass (for example, at least 70% or another predetermined threshold) has been reached.

Formal Sign-Off Rates:

- Use a formal sign-off process where decision-makers or key stakeholders submit their approval. Monitor the number and percentage of sign-offs to the total number of stakeholders. A rising trend indicates a growing commitment.

Attendance and Engagement Analytics:

- During decision-making sessions like workshops or town halls, track attendance, participation rates, and interactive responses (such as real-time polls). High engagement from the key groups signals that they are actively processing the change and leaning toward commitment.

Decision Communication Metrics:

- After the decision-making process, measure how quickly and widely the decision is communicated within the organisation. For instance, track how many leaders have disseminated the firm decision in their teams and whether additional questions or objections persist.

Feedback and Follow-Up Surveys:

- Use targeted follow-up surveys to ask stakeholders if they feel confident and committed to the change. Their feedback can help determine whether the decision was firm and if any lingering uncertainties need to be addressed.

Create a comprehensive picture that confirms whether enough people have made a firm decision and are committed to proceeding with the change.

Identify the Benefits and Value of Change

BENEFITS OF CHANGE	VALUE OF CHANGE

Create a Sense of Urgency

What are the positive and negative drivers of this change?

POSITIVE DRIVERS	NEGATIVE DRIVERS

Identify Potential Risks and Anxieties



DATA GROUP(S):	
WHAT RISKS DO YOU SEE?	WHAT ARE YOUR MAIN CONCERNS?

Identify Potential Risks and Anxieties

RISK/CONCERN	HOW TO ADDRESS

Be Realistic

If you want to lead stakeholders towards a commitment to change, you must be realistic about the challenges ahead, your current capacities, the time required for change, the main issues, the extent of change needed, competing interests, the business impact, and what can be achieved.

Degree of change required	
Any competing interests?	
What challenges could we face?	
How much capacity do we have right now?	
How long will it take to change?	
What are the main issues we must address?	
Business impact	
What can we realistically achieve?	

Build Confidence

People often fear what change might mean and whether they will meet performance expectations. Therefore, it is essential to send frequent and specific messages about the group's current or future capacity for success.

STRENGTHS TO HIGHLIGHT	LIMITATIONS TO OVERCOME

03

STEP 3



WHAT TO DO IN STEP 3

QUESTIONS TO ASK

- Are we fully equipped to succeed?
- What are our key strengths and areas for improvement?
- Are we committed to fully supporting this change?
- What specific steps must each stakeholder take in the coming weeks to prepare for the change?
- Which potential obstacles or challenges might hinder our readiness, and how can we proactively address them?
- What resources, internal or external, are currently available, and what additional support might we need?
- How will we measure the success of our preparation efforts?
- Which processes or systems need to be altered or updated as part of the change?
- What are the key milestones or target dates for our preparation activities?
- How can we create formal channels for ongoing feedback during the preparation period?
- What early warning signals might indicate that we are not ready for change, and how will we monitor for them?
- Are we prepared to manage and adjust to unexpected setbacks during the preparation phase?

Push stakeholders to consider practical steps, resource allocation, and the details of execution, along with ongoing monitoring. Ensure that the team not only commits to change but is genuinely prepared to handle the transition effectively.

**PREPARE WELL, SUCCEED
EVERY DAY**



Assess Change Fitness

Every step in the change process can be mentally and emotionally challenging. Some people may struggle or even give up if they don't have the right psychological strength. This strength is called "change fitness."

Here are three key points for change leaders to consider about stakeholders' change fitness:

1. Overall Group Fitness:

- If a stakeholder group shows low change fitness, they may need more time and extra support. This means success might take longer, and the process will need to be adjusted accordingly.
- If change fitness is high, the group is likely to adapt more easily.

2. Key Change Agents:

- Identify individuals who naturally handle change well. These key change agents can serve as positive role models and should be involved early in the process.
- It is important that all designated leaders and influential team members have high change fitness to guide the overall effort.

3. People Who Struggle with Change:

- Know who finds change particularly difficult. Individuals with low change fitness are more likely to disengage or resist, so they need to be given extra support to build their resilience—not criticised for their struggles.

Accurately measuring change fitness is a specialised task. A proven way to do this is by using IRVEY®. For more information or to arrange an assessment, contact us at contact@thechange gym.com. Once the assessment is complete, you can use the provided tables to review the results.

IRVEY is The Change Gym's proprietary change fitness assessment tool. It measures your team's readiness for change with a global score and insights across key areas, helping you tailor support effectively.



Establish the Vision & Business Case

Engage Stakeholders:

- Involve both senior leaders and representatives from lower levels to gather diverse perspectives and insights. Run interactive workshops or focus groups to capture ideas about the project's goals and long-term benefits.

Define a Clear Goal:

- Articulate exactly what the change aims to achieve. Use data and real-life examples to make a compelling case, addressing both the opportunities of acting and the risks of inaction.

Align with the Organisational Vision:

- Demonstrate how the proposed change supports the organisation's overall mission and strategic objectives. Develop a visual roadmap or narrative that connects the new initiative with the broader future state of the business.

Develop the Business Case:

- Prepare a detailed document that outlines the tangible benefits of the change, including expected financial gains, improved efficiency, and competitive advantages. Additionally, include a realistic assessment of the required resources and potential challenges.

Secure Leadership Endorsement:

- Ensure that senior management supports the vision by involving them early in the planning process. Their backing is crucial to legitimise the change and drive commitment organisation-wide.

This structured approach not only clarifies the project's purpose but also builds a solid, data-supported case for change that aligns with the overall vision and garners the necessary support for successful implementation.

Establish Governance and CMT

Define Roles and Responsibilities:

- **Sponsor and Leadership:** Identify a senior champion who will sponsor the change initiative and provide high-level support.
- **Change Management Team:** Appoint a core team responsible for planning, executing, and monitoring the change process. Clarify each member's role to avoid overlap and ensure accountability. Check the change fitness of this team to ensure fit.
- **Governance Group:** Establish a separate governance body that includes key decision-makers, ensuring oversight and alignment with overall business objectives.

Create Clear Communication Channels:

- **Flow of Information:** Establish regular meetings, status reports, and digital platforms (such as collaboration tools or dashboards) to ensure seamless communication among the change management team, governance group, and broader stakeholder groups.
- **Feedback Loops:** Implement mechanisms (like surveys or dedicated liaison roles) that allow the governance body to receive updates from various stakeholder groups. Their input should then be communicated back to the change team, ensuring a two-way flow of information.

Document Governance Structures:

- Create a clear governance framework or charter that outlines the roles, responsibilities, decision-making authority, and reporting lines for everyone involved. This document will serve as a reference point throughout the change process.

Ensure Representation of Key Stakeholders:

- Involve representatives from all critical stakeholder groups, both from senior management and operational levels, to provide diverse perspectives. This inclusivity not only enriches decision-making but also helps build broader commitment to the initiative.

Establish Regular Review Mechanisms:

- Schedule periodic check-ins and reviews where the governance group can monitor progress, address issues, and adjust the plan as needed. Use these sessions to ensure that everyone remains aligned with the project's objectives.

By establishing clear roles and ensuring regular oversight, you create a governance structure that supports the change initiative from both strategic and operational perspectives.

Define Roles and Teams

Identify Key Roles:

- List the functions you need, such as research, communication, planning, interviewing, and creating visuals.

Match Skills to Roles:

- Determine the specific skills each role requires. For instance, assign someone with strong analytical skills to research, a clear communicator to share updates, and a detail-oriented planner to organise tasks.
- Identify who among your team is naturally good at conducting interviews and building trust, as well as who can simplify complex information into visual formats.

Review and Select Team Members:

- Evaluate existing team members against these role requirements.
- Choose individuals who best fit the skill set for each position, considering past performance and current strengths.

Define Responsibilities:

- Detail what each role involves. Ensure that everyone understands their tasks and how they contribute to the overall success of the project.
- Document these responsibilities to avoid confusion and overlap.

Foster Collaboration:

- Establish effective communication channels for these teams to share information.
- Encourage regular check-ins so that every role stays aligned with the project's goals and can support one another.

This process ensures that the right people are in the right roles, paving the way for a well-organised and successful change project.

Identify Stakeholder Groups and Levels of Involvement

List All Stakeholders:

- Begin by listing every group that could be impacted by or influenced by the change. This may include internal teams (such as governance, change leaders, team leaders, and team members) as well as external groups (like suppliers and customers).

Assess Impact and Influence: For each stakeholder group, evaluate two key factors:

- **Impact:** How directly will they be affected by the change? For example, a sales team might be deeply involved, while HR might only be indirectly affected.
- **Influence:** How much power do they have to influence the change process? Mapping these insights (using a simple matrix, for instance) can help you prioritize where to focus involvement efforts.

Determine Involvement Levels: Based on your assessment, assign each group a level of involvement:

- **High Involvement:** Stakeholders who are directly affected or who drive the change.
- **Medium Involvement:** Groups that are somewhat affected and play a supportive role.
- **Low Involvement:** Stakeholders with minimal impact or influence, where communication can be more informative than interactive.

Plan Communication and Engagement:

- Develop tailored engagement strategies for each group. High-involvement groups typically hold regular meetings and actively participate in decision-making, whereas low-involvement groups often receive updates and information.

Review and Adjust:

- Regularly revisit your stakeholder mapping. Changes in the project or environment may alter a group's involvement level, so maintain open communication channels to receive feedback and adjust plans as needed.

Identify who is involved and determine the level of their engagement. Ensure the most critical issues in high-priority groups are addressed promptly and keep all other stakeholders informed and aligned throughout the change process.

Create Milestones

Map Out the Project Phases:

- Start by breaking the project into main stages or tasks. Identify the beginning, key transitions, and the final goal. This helps you see the overall structure and where milestones naturally occur.

Identify Key Deliverables:

- Within each phase, pinpoint critical deliverables or decisions that mark progress. These should be clear, measurable, and significant markers that indicate the project is moving in the right direction.

Plan a Logical Progression:

- Arrange the milestones in a sequence that shows a clear path from start to finish. Make sure each milestone builds on the last, acknowledging that some may only emerge as you progress. Be flexible—plan as many as you can upfront, but be ready to update them as new insights emerge during implementation.

Communicate and Monitor:

- Share the milestone plan with all stakeholders through meetings, visual timelines, or project management tools. This ensures everyone knows the key targets and can track progress together.

Create a clear roadmap that guides your team through the change process and allows adjustments as the project unfolds.

Develop Policies and Procedures

Identify Your Needs:

- Determine which policies and procedures must be implemented. For example, decide on time allocations for change activities, stakeholder expectations, and methods to maintain core business operations.

Define Clear Expectations:

- Specify what each stakeholder is expected to do during the change. Outline how much time they need to commit and how their performance will be measured.

Plan for Business Continuity:

- Develop procedures to sustain ongoing service or product delivery while the change is implemented. Address how the organisation will handle day-to-day operations in conjunction with the change effort.

Manage Competing Priorities:

- Resource Allocation: Indicate which resources (personnel, budget, time) are reserved exclusively for the change effort.
- Prioritisation Criteria: Establish guidelines to determine when BAU activities might be postponed or scaled back in favour of critical change milestones.

Manage Conflicting Interests:

- Create policies that balance different change initiatives or competing priorities. This might include transparent decision-making processes and procedures for resolving conflicts.

Outline the Decision-Making Process:

- Include guidelines on how decisions related to the change project will be made. Define who has the authority to approve changes and how these decisions will be communicated.

Create a framework that clearly delineates responsibilities, ensures sustained core business operations, and protects the change project from being overtaken by the routine pressures of daily work.

Form Communication Plans

Define Your Objectives and Audience:

- Begin by defining the objectives of your communication (e.g., increasing awareness, reducing uncertainty, clarifying expectations).
- Identify who needs to hear what information, from executives and managers to team members and external stakeholders.

Map the Information Flow:

- Outline how messages will travel up and down the organisational structure.
- Decide which communications are delivered through formal channels (like meetings, emails, and dashboards) and how you will manage informal communication to keep it aligned with official messages.

Assign Communication Roles and Responsibilities:

- Designate a communications lead or team responsible for shaping and delivering key messages.
- Determine who will craft and review the content to ensure consistency and clarity throughout.

Plan the Message Content and Timing:

- Identify the type of information to be conveyed: project updates, role clarifications, timelines, and expectations.
- Strike the right balance - provide enough detail to inform without overwhelming.
- Develop a timeline for when communications should be delivered, syncing with project milestones so that the right message reaches the right audience at the right time.

Select Appropriate Communication Media:

- Choose the best channels for each type of message, whether that's formal emails, video conferences, face-to-face sessions, or an intranet portal.
- Consider the nature of the message when deciding on media—for example, sensitive topics might be better addressed in a live meeting.

Establish Feedback and Control Mechanisms:

- Create processes for collecting feedback from stakeholders to gauge understanding and make adjustments.
- Set controls over informal communication by clarifying guidelines and training key communicators, ensuring the core message remains intact.

Document Roles and Expectations:

- Document how and when each stakeholder will receive updates, what their role is in the process, and who to contact with questions or feedback.

Establish Success Criteria

Define What Success Looks Like:

- Work with key stakeholders to outline specific outcomes for each step and milestone. Ask yourself, "What behaviours or results should we see?" For example, if a milestone is to complete training sessions, success might be defined as 90% attendance and a 75% improvement in post-training assessments.

Set Measurable Targets:

- Create key performance indicators (KPIs) that directly relate to the expected outcomes. These could include metrics such as task completion rates, quality scores, customer satisfaction ratings, or improvements in financial performance. Ensure each KPI is clear, quantifiable, and tied to a specific timeline.

Monitor and Adjust:

- Establish regular checkpoints to review progress against your criteria. Use surveys, data analytics, or feedback sessions to measure the behaviours and outcomes you identified. If results don't meet your targets, be prepared to adjust your approach.

Document and Communicate:

- Write down the success criteria for each milestone and share them with your team. Clear documentation ensures everyone knows what is expected and can work together towards the common goal.

By carefully defining, measuring, and communicating these standards, you create a roadmap that not only guides the project but also helps you celebrate small wins along the way.

Decide on Rewards

Define Success and Desired Behaviours:

- Clearly outline what successful performance looks like for each milestone.
- Identify the specific behaviours and outcomes you want to encourage during the change journey.

Select a Variety of Reward Types:

- **Financial:** Bonuses, salary increments, or performance-based incentives can be used for significant achievements.
- **Non-Financial:** Public recognition, awards, certificates, additional professional development opportunities, extra time off, or symbolic rewards (like plaques or team outings) can be powerful motivators.

Establish Fair and Transparent Criteria:

- Develop clear, measurable standards that reward attainment is based on, ensuring that every stakeholder understands how they can achieve a reward.
- Involve team leaders in setting these criteria, so that the process is perceived as fair and equitable across the board.

Communicate the Rewards Framework:

- Share the reward criteria and processes with all stakeholders as early as possible.
- Ensure everyone knows what rewards are available, how they can be attained, and what behaviours will be recognised.

Implement Timely Recognition:

- Provide rewards as soon as milestones or key behaviours are demonstrated, reinforcing the positive impact of their contributions.
- Celebrate successes both publicly and privately, so that individual and team achievements are acknowledged appropriately.

Monitor, Gather Feedback, and Adjust:

- Regularly evaluate the rewards system to ensure it remains fair, relevant, and motivating.
- Solicit feedback from stakeholders to refine the process and address any areas where the reward system might need adjustment.

Create a rewards framework that motivates participants, boosts morale, and ensures recognition is distributed fairly across the change journey.

Plan Training and Support

Identify Barriers and Needs:

- Conduct a training needs assessment to pinpoint what new skills and knowledge stakeholders require.
- Look beyond technical skills and consider “change fitness” – the ability to handle the mental and emotional challenges of change.

Define Training Requirements:

- List the specific training topics, from operational procedures to change management skills.
- Determine which groups need targeted training (for example, leaders might need advanced change management training, while frontline staff might need practical, role-specific instruction).

Create a Training Schedule:

- Outline when training sessions should take place, noting some may occur during planning (Step 3) and others during implementation (Steps 4 and 5).
- Ensure the schedule allows for ongoing support, not just one-off sessions.

Decide Who Will Deliver the Training:

- Choose expert internal trainers, external consultants, or online resources (such as the Change Gym’s change programs) to deliver the training.
- Make sure those delivering the training are well-prepared and equipped to support various learning styles.

Establish Support Channels:

- Communicate where stakeholders can obtain help and what types of support are available (e.g., coaching sessions, online forums, or dedicated help desks).
- Ensure everyone understands which new behaviours are expected and how they can access resources to develop these skills.

Create a robust environment that builds the necessary operational skills and enhances stakeholders’ ability to adapt and thrive during the change.

Develop Change Plans

Consolidate the Elements:

- Gather all previously developed pieces: your vision, stakeholder analyses, communication and training plans, etc. This ensures you have everything needed in one place.

Identify and Sequence Milestones:

- Break down the long-term goal into clear, manageable milestones. Arrange them in a logical order so that each milestone becomes a stepping stone toward the overall objective.

Assign Stakeholder Groups:

- For each milestone, identify the specific stakeholder groups involved. Note which groups will drive the milestone, who will be impacted, and where extra support may be required.

Highlight Change Management Issues:

- Make a list of relevant change management issues for each milestone: risks, resource constraints, communication needs, or training requirements. By matching issues with milestones, you can proactively address challenges as they arise.

Create a Visual Roadmap:

- Develop a timeline or a visual flowchart that lays out the milestones, stakeholder roles, and key issues side by side. This visual tool will serve as a quick reference for all parties involved and help keep the project on track.

Ensure Flexibility:

- While planning is essential, allow room for adjustments. Not all milestones may be visible from the start, so build in regular reviews to refine the plan as you progress and new insights emerge.

Form a coherent change plan that bridges your short-term actions with your long-term goals, ensuring every piece works together toward a successful transformation.

Assess Change Fitness

STAKEHOLDER GROUPS	FITNESS SCORE	STRENGTHS	LIMITATIONS
ORGANISATION			
DIVISION			
TEAM			
TEAM			
TEAM			

STAKEHOLDER GROUP	PEOPLE WITH HIGH/LOW CHANGE FITNESS

Establish the Vision & Business Case

PROJECT GOAL	ALIGN WITH VISION	BUSINESS CASE

Establish Governance and the Change Management Team

ISSUE	RESPONSE
Who is on the governance team?	
Who is the project sponsor(s)?	
Who is on the change management team?	

Define Roles and Teams

ROLES	TEAMS

Identify Stakeholder Groups and Levels of Involvement

STAKEHOLDER GROUP	HI INVOLVEMENT	MID INVOLVEMENT	LO INVOLVEMENT

Create Milestones

MILESTONES	CONSTITUTING TASKS

Develop Policies and Procedures

POLICIES/PROCEDURES	DONE

Establish Success Criteria



STEP OF THE CHANGE PROCESS	WHAT BEHAVIOURS SHOW SUCCESS? METRICS?
Step 1 – Towards Awareness	
Step 2 – Towards Commitment	
Step 3 – Towards Preparation	
Step 4 – Towards Mastery	
Step 5 – Towards Normality	

04

STEP 4



WHAT TO DO IN STEP 4

QUESTIONS TO ASK

- **How is the change progressing?** What progress have we made so far with the change?
- **What learning needs are emerging?** What new skills or knowledge do people need as the change unfolds?
- **Are we adequately addressing these learning needs?** Are we providing the right support and training to meet these new needs?
- **Are stakeholders hearing the 5 change readiness messages?** Are all the key messages about being ready for change being communicated clearly to everyone?
- **Is the level of support adequate for each stakeholder?** Does every stakeholder receive enough support during the change process?
- **Are blockages to progress identified & removed?** Have we discovered any obstacles to progress, and are we effectively eliminating them?
- **Are stakeholders experiencing short-term wins?** Are people seeing small successes along the way that build momentum?
- **Is success recognized in tangible ways?** Are we celebrating achievements in clear, meaningful ways?
- **Are struggle, failure, and setbacks normalised as part of the change process?** Do people understand that challenges and mistakes are a normal part of the change?
- **Are stakeholders encouraged to take risks?** Are people motivated and supported to try new approaches, even if there might be some risks?
- **Do stakeholders feel safe?** Do people feel secure and supported as they adapt to the change?
-

Here are the five change readiness messages:

- *We recognise a problem or opportunity.*
- *This issue is important and needs attention.*
- *We can design a practical solution.*
- *We have the skills and resources to succeed.*
- *Management is fully behind you.*

A woman with long, dark, wavy hair is seated at a wooden table. She is wearing a dark-colored long-sleeved top. Her right hand is holding a white marker, and she is looking off to the right with a thoughtful expression. The background is a plain, light blue wall. The text "MASTERY GROWS THROUGH RELENTLESS PRACTICE" is overlaid in white, bold, sans-serif font across the center of the image.

**MASTERY GROWS
THROUGH RELENTLESS
PRACTICE**

Monitor Progress

Review Your Milestones:

- Gather the list of milestones you established in Step 2 (and update with any new ones). These milestones represent the specific goals and behaviours you want to see as the change unfolds.

Monitor Your Metrics:

- For each milestone, check that measurable indicators reflect successful progress. This could include attendance at key meetings, completion of tasks, or behavioural changes that align with the change objectives.

Regular Check-ins:

- Schedule periodic reviews with the relevant stakeholder groups. Use structured meetings or progress reports to discuss how well each milestone is being met and to identify any challenges that may arise.

Assess Stakeholder Outcomes:

- Focus on the behaviours that demonstrate success. Ask questions such as: Are team members adopting new practices? Is communication improving? Use feedback tools, surveys, or performance data to gauge these outcomes.

Adjust as Needed:

- If you discover that a milestone is falling short, analyse why the desired behaviours aren't being achieved. Address any obstacles promptly by providing additional support or making necessary changes to the plan.



Ensure that your change project remains on course and that stakeholders are progressing towards the defined outcomes.

Adjust Change Plans

Remain Flexible:

- Treat your change plan as a guide rather than a strict rulebook. Recognise that as you move into later stages (Steps 4 and 5), some planned milestones might prove unrealistic or unachievable, while others may be reached sooner than expected.

Review and Revise Milestones:

- Regularly review your milestones. If certain targets are not being met or if new opportunities emerge, adjust your plan accordingly. Be prepared to replace or add milestones as needed.

Monitor Stakeholder Feedback:

- Keep lines of communication open with your stakeholders. Their feedback and progress will help you identify which aspects of the plan require modification, ensuring the plan remains aligned with real-world conditions.

Embrace Changes:

- Accept that change is dynamic. When circumstances evolve, modify your plan to reflect the emerging priorities and unforeseen requirements, ensuring the project stays on track.



By remaining flexible and responsive, you can keep your change project moving forward effectively, even when the original plan requires adjustments.

Leverage Strengths

Engage Strengths at the Right Times:

- Align stakeholders with tasks when their strengths are most needed. Schedule their involvement so that high change fitness and specialised skills are maximised during key milestones of the project.

Create Opportunities to Share and Grow:

- Encourage team members to share their expertise with others, possibly through mentoring or collaborative sessions. This not only leverages existing strengths but also helps raise the overall change readiness of the group.

Monitor and Adjust:

- Regularly review how well stakeholders are performing in their roles. If someone's strengths are underutilised or if new strengths emerge, be flexible in adjusting roles to ensure the best fit at each stage of the change process.



Ensure that every stakeholder's strengths are fully utilised to drive the change project forward, making the best use of the capabilities within your team.

Scaffold Limitations

Identify the Limitations:

- Begin by recognising both skills gaps and areas where stakeholders have lower change fitness or organisational readiness. Use assessments, feedback, and observations to pinpoint these areas for improvement.

Provide Training and Coaching:

- If a limitation can be addressed by enhancing knowledge or skills, implement targeted training or coaching sessions. This is the most straightforward fix for measurable deficiencies in operational capability.

Implement Scaffolding Measures:

- For limitations that relate to change fitness or broader organisational readiness, quick fixes may not suffice. In these cases, build supportive structures, scaffolds, to help manage the risk. This might include:
 - Increased hands-on guidance from managers or leaders who can closely monitor progress.
 - Establishing dedicated support teams or mentors who work alongside those who are struggling.
 - Bringing in external experts or consultants to offer specialised assistance.

Integrate into Risk Management:

- Recognise that scaffolding is fundamentally about managing risk. Outline a clear action plan that describes which limitations will have scaffolds, who is responsible for implementing them, and what the expected outcomes are.

Monitor and Adapt:

- Regularly review the effectiveness of these scaffolds. Solicit feedback, track improvement metrics, and be prepared to adjust the support measures as needed.

Ensure that limitations do not derail the change process. Instead, provide the necessary support to help everyone progress successfully through the transition.

Monitor & Support Learning Needs

Assess Learning Needs Early:

- Use surveys, interviews, or informal discussions to identify which new and emerging skills and behaviours stakeholders require. This initial assessment helps pinpoint where learning gaps exist right from the start.

Set Up Regular Check-Ins:

- Schedule frequent progress reviews and one-on-one sessions—especially during the early implementation phases (Steps 4 and 5). These meetings allow you to observe how individuals are adapting, identify any challenges, and address them promptly.

Encourage Open Communication:

- Create an environment where people feel comfortable discussing difficulties and asking for help. Listen for verbal and nonverbal cues that indicate someone is struggling, and make it clear that setbacks are a natural part of the learning process.

Offer Targeted Support:

- Provide training, coaching, or mentoring based on the identified learning needs. For example, if someone is having trouble mastering a new system, arrange dedicated training sessions or pair them with a more experienced colleague.

Turn Setbacks into Learning Opportunities:

- When mistakes occur, work closely with the individual to review what happened, understand the lessons, and plan how to avoid similar issues in the future. This reflective practice can build resilience and improve overall change fitness.

Document Progress and Adjust as Necessary:

- Keep records of how learning outcomes are developing, and use this data to refine training programs and support measures. Regular feedback ensures that support is both timely and effective, helping everyone adapt to change more successfully.

Ensure that learning opportunities are capitalised on and stakeholders receive the support they need to develop the new skills and behaviours required for the change project.

Model Adaptive Behaviours

Lead by Example:

- Managers and leaders must visibly demonstrate adaptive change behaviours in their daily interactions. Show openness to new ideas, a willingness to learn from setbacks, and resilience in navigating challenges.

Be Authentic:

- Change fitness behaviours are a genuine expression of psychological strength, not just a checklist to follow. Ensure that your actions and attitudes reflect true adaptability and confidence in handling change.

Communicate Openly and Frequently:

- Share your experiences of learning, adjusting, and occasionally stumbling along the way. This transparency helps create an environment where others feel safe to experiment, take risks, and learn from their setbacks.

Encourage Dialogue:

- Foster a culture that welcomes feedback. When team members observe how you handle change, they are more likely to adopt similar behaviours, particularly if they have the opportunity to discuss challenges and share their own experiences.

Provide Continuous Support:

- Recognise that modelling adaptive behaviours is not a one-off event. Regularly reinforce these behaviours through ongoing coaching, mentoring, and recognising adaptive efforts among your team.

By consistently and authentically demonstrating adaptive behaviours, leaders play a crucial role in building an organisational culture that embraces change. This commitment sets the tone for others and helps everyone cultivate the resilience and flexibility needed for long-term success.

Identify and Remove Barriers

Identify the Barriers:

- Conduct open discussions, surveys, or one-on-one meetings to gather feedback from stakeholders.
- Observe organisational processes and communication flows to spot obstacles in real time.

Analyse the Root Causes:

- Determine whether each barrier stems from a skills gap, communication issue, resource limitation, or cultural resistance.
- Prioritise barriers that most negatively impact progress and stakeholder engagement.

Develop Targeted Solutions:

- For training-related issues, offer tailored coaching sessions or workshops to address specific knowledge gaps.
- For organisational or process-related obstacles, consider restructuring workflows, reallocating resources, or clarifying roles and responsibilities.

Engage Leadership:

- Ensure that managers and leaders actively support and drive the removal of barriers. Their visible involvement can accelerate change and encourage wider acceptance.

Implement and Monitor:

- Put your solutions into practice and set up regular check-ins to assess their effectiveness.
- Be prepared to make further adjustments as needed, since new barriers may emerge during the change process.

Actively reduce obstacles and help maintain momentum throughout the change initiative, ensuring that everyone has the opportunity to succeed.

Generate Short-Term Wins

Break Down the Project:

- Divide the overall change project into small, manageable tasks that contribute to the larger milestones. This ensures that everyone can experience achievable successes along the way.

Manage Clear, Achievable Milestones:

- Ensure clear goals for each stage of the change project that are realistic and attainable. These targets should be aligned with the long-term vision, providing measurable steps that build momentum and drive progress.

Monitor Progress Closely:

- Regularly review the progress of each small task and milestone. Frequent check-ins can help identify challenges early, making it easier to offer support where needed.

Support and Encourage:

- Recognise that setbacks are a regular part of the learning process. When obstacles arise, work closely with stakeholders to understand the lessons learned and adjust tasks if necessary to make them more achievable.

Celebrate Achievements:

- Acknowledge and reward each short-term win. Celebrating these successes boosts morale and reinforces that progress is being made in the right direction.

Adjust as Necessary:

- If you notice that people are consistently struggling or facing setbacks, consider that the tasks may be too challenging at this stage. Reassess and modify them to maintain a steady stream of achievable wins without overwhelming your team.

Structure the change project into a series of small, achievable steps so you help stakeholders experience regular, positive outcomes. This builds confidence and sustains momentum throughout the change process.

Manage Resources

Establish Resource Allocation:

- Clearly define the resources available, whether it's time, funds, personnel, or training materials. Determine the amount of time allocated to each milestone or step of the change process, and assign budgets for training and support as needed.

Plan for Resource Deployment:

- Match the available resources to the requirements of each part of the change project. For instance, ensure that critical tasks have sufficient time and funding, while routine tasks are adequately supported without excess expenditure.

Implement Monitoring Procedures:

- Develop a process for tracking resource usage. This could involve regular progress reviews, budget assessments, and time logging. Use project management tools or dashboards to monitor whether resources are being utilised effectively and to promptly flag any overruns or shortages.

Define Clear Responsibilities:

- Assign accountability by establishing a clear line of responsibility for resource management. Ensure that team leaders or managers are responsible for overseeing their respective allocations, reporting on progress, and making adjustments as needed.

Adjust as Necessary:

- Remain flexible. If you find that certain milestones require additional resources or that some resources are underutilised, be prepared to reallocate them. This approach ensures that resource management remains aligned with the evolving needs of the change project.

Ensure that allocated resources are managed efficiently, supporting the successful delivery of the change project while keeping within budget and time constraints.

Maintain a Safe Environment

Create a Supportive Culture:

- Foster an atmosphere where stakeholders feel secure to take calculated risks. Emphasise that mistakes are acceptable and viewed as valuable opportunities for growth, rather than occasions for punishment.

Set Clear, Positive Boundaries:

- Define what constitutes acceptable risk-taking versus reckless behaviour. Provide guidelines and examples so that everyone understands the difference, thereby promoting creativity without compromising safety or performance.

Lead by Example:

- Ensure that managers and leaders actively model a safe, adaptive approach to change. When leaders openly discuss their own learning experiences and setbacks, it reinforces a culture of authenticity and resilience.

Encourage Open Communication:

- Establish channels for honest feedback and dialogue. When stakeholders feel heard and supported, they are more likely to experiment, innovate, and share lessons learned without fear of negative repercussions.

Provide Ongoing Support:

- Offer programs such as coaching or mentoring that help individuals manage challenges and build confidence as they adopt new behaviours. This support structure enables people to learn and refine their skills while knowing they have a safety net.

Prioritise building a safe environment where innovation thrives, risks become learning opportunities, and everyone feels empowered to contribute positively during the change process.

Monitor Progress

MILESTONE	PROGRESS

Scaffold Limitations

LIMITATIONS	STAKEHOLDERS

Identify and Remove Barriers

BARRIERS	HOW TO REMOVE

Define Roles and Teams

ROLES	TEAMS

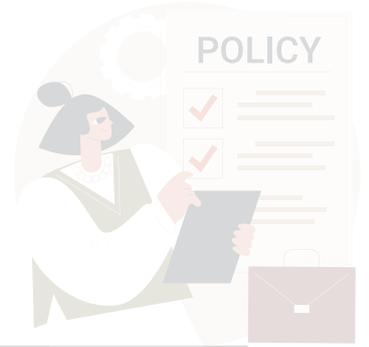
Identify Stakeholder Groups and Levels of Involvement

STAKEHOLDER GROUP	HIGH	MID	LOW

Create Milestones

MILESTONES	CONSTITUTING TASKS

Develop Policies and Procedures



POLICIES/PROCEDURES	DONE

Establish Success Criteria

STEP OF THE CHANGE PROCESS	WHAT BEHAVIOURS SHOW SUCCESS? METRICS?
Step 1 – Towards Awareness	
Step 2 – Towards Commitment	
Step 3 – Towards Preparation	
Step 4 – Towards Mastery	
Step 5 – Towards Normality	

05

STEP 5



WHAT TO DO IN STEP 5

QUESTIONS TO ASK

- What progress have we made with the change?
- What new learning needs have emerged?
- How are we meeting these new learning needs?
- Are the key change readiness messages being consistently shared with stakeholders?
- Is the support provided sufficient for everyone involved?
- Have we identified and removed any obstacles to progress?
- Do we recognise success in tangible, meaningful ways?
- Are struggles, failures, and setbacks accepted as a normal part of the change process?
- Are stakeholders encouraged to take calculated risks?
- Do stakeholders feel secure and supported throughout the process?
- Does the organisational culture actively support the change?
- Are new behaviours being effectively embedded into the culture?



In Step 5, focus on making new behaviours the norm by continuing the tasks from Step 4, such as monitoring progress, adjusting plans, and supporting learning, while also addressing four new tasks specific to this stage.

A group of people are gathered in a meeting room, clapping and smiling. In the foreground, a man in a yellow t-shirt is clapping and smiling. Behind him, a woman in a white shirt is also clapping and smiling. The room has a modern, open-plan design with a white lattice railing and a large circular light fixture. The text "SAFE SPACES FOSTER CREATIVE INNOVATION" is overlaid in bold yellow letters.

SAFE SPACES FOSTER CREATIVE INNOVATION

Sustain Acceleration

Keep the Pace:

- As people become more comfortable and skilful, maintain a consistent push towards your goals. Utilise regular progress reviews and short-term wins to maintain high energy levels.

Support Ongoing Learning:

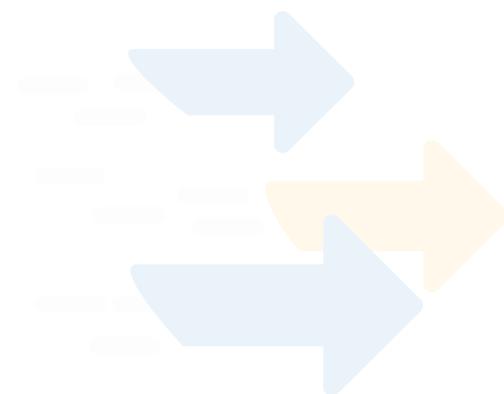
- Recognise that even with a flattened learning curve, mistakes and setbacks will occur. When they do, address them quickly, offering extra help or coaching so that these challenges become valuable learning experiences.

Communicate Openly and Often:

- Keep communication channels open about progress, challenges, and successes. This transparency helps maintain trust and lets everyone know setbacks are part of the process, not failures.

Adjust When Necessary:

- Stay alert to any signs of slowing momentum or persistent difficulties. Be ready to adjust plans or provide additional resources to tackle unexpected obstacles.



By balancing a strong drive for progress with supportive measures and adaptive strategies, you can sustain acceleration throughout the change process, even when occasional setbacks occur.

Institute Change in the Culture

Consistently Communicate New Norms:

- Regularly share stories and examples that show the desired behaviours, emphasising that "this is how we do things around here." This repetition helps embed the new cultural norms.

Set Clear Expectations and Accountability:

- Establish unambiguous expectations around the new behaviours. Once these expectations are understood and adopted, you won't need to continuously remind people that these are new practices. However, make it clear what the consequences will be of not meeting expectations.

Create Tangible Symbols:

- Develop visible signs or markers, such as revised policies, awards, or visual displays, that reinforce the normality of the new behaviours. These symbols serve as constant reminders of the cultural change.

Ensure the old ways gradually give way to the new, and new behaviours become an integral, lasting part of the organisational culture.

Terminate the Project

Confirm Milestone Completion:

- Ensure every planned milestone has been reached and that all associated tasks have been successfully delivered.

Check Cultural Integration:

- Verify that the new behaviours have been fully adopted and integrated into the culture. The organisation should be able to support and maintain these behaviours without further intervention.

Finalise Documentation and Reviews:

- Conduct a final review or lessons learned session with the key stakeholders. Document successes, challenges, and any insights for future projects.

Communicate Project Closure:

- Clearly announce the official termination of the project to all stakeholders. Summarise the achievements and communicate how new practices will be supported moving forward.

Release Resources:

- Reallocate or release project-specific resources, such as budget, personnel, or equipment, to ensure a smooth transition to ongoing operations.

Celebrate Success:

- Acknowledge and celebrate the successful completion of the project. This reinforces the changes made and helps solidify them as the new norm.

By waiting until all milestones are met and the culture is ready to support the changes, you minimise the risk of regression into old behaviours.

Review and Retell

Conduct a Comprehensive Review:

- Bring together key team members and stakeholders for a retrospective meeting. Reflect on what worked, what didn't, and the lessons learned throughout the change project.

Capture Key Insights:

- Document discoveries about your team's strengths, challenges, and overall change experience. Ask questions like, "What did we learn about our methods?" and "How did this project reshape our understanding of change?"

Craft New Narratives:

- Transform these lessons into compelling stories that showcase your successes and growth. These narratives will serve as cultural capital and powerful evidence for future projects.

Share and Institutionalise:

- Disseminate these stories across the organisation so that the new behaviours and successes become part of the organisational mythos, fueling and inspiring future change.



By reviewing and retelling your experiences, you celebrate achievements and build a foundation for continuous improvement and cultural evolution.



The Change Gym wishes you every success in your change management journey.

Use these ideas as a roadmap towards progress, helping you navigate each step with confidence. Remember, change is a process, and each small win brings you closer to your goals. Stay determined, keep learning, and know that you have the strength to overcome any hurdles along the way.

Your continued efforts pave the way for a brighter future.

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