

Change Management Checklist

All the resources you need for every step of your project

1. Develop Your Plan of Action

- Identify a Project Manager
- Identify a Change Champion
- Identify goals on your project charter:
 - [What is a project charter?](#)
 - [Project charter template](#)
- Develop a plan of action
- Identify your change team
- Set SMART goals:
 - [What is a SMART goal?](#)
 - [Creating SMART goals](#)
- Use a Gantt Chart to track progress:
 - [What is a Gantt Chart?](#)

3. How will the change affect your organization?

- Interview leaders and subject matter experts
- Process map the current and future state:
 - [Process mapping overview](#)
 - [Process mapping step-by-step](#)
- Develop a communication plan
 - [Communication plan template](#)

2. Gather Your Team

- Set up your kickoff meeting
 - [Team kickoff part 1](#)
 - [Team kickoff part 2](#)
 - [Team member highlights](#)
- Hold a team building exercise at your kickoff meeting
- Complete an initiative contract at your kickoff meeting:
 - [Initiative contracts part 1](#)
 - [Initiative contracts part 2](#)
 - [Initiative contract template](#)



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4. Develop a strategy

- Focus on the process, not the people
- Get change resisters on board:
 - [Managing Disruptors/Resistors Video](#)
 - [Managing Disruptors/Resistors Exercise](#)
- Review your charter, plan of action, and confirm role clarity for the team

5. Implement the plan

- Review past After Action Reviews to avoid repeating issues
- Use a Kanban board to show progress:
 - [What is a Kanban Board?](#)
 - [Trello and the Kanban method](#)
- Use the Influence Model to foster your change and keep the team on board:
 - [Influence Model- Part 1](#)
 - [Influence Model- Part 2](#)
 - [Influence Model template](#)
 - [Facilitating the Influence Model](#)
- Use your communication plan every step of the way
- Develop performance indicators and give incentives to your team
- Update your Gantt Chart after weekly meetings
- Celebrate every milestone!

6. Review the change

- Complete an after action review after implementation and document what went well and what could have been better:
 - [Introduction to After Action Reviews](#)



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