

## The PLAN Phase – A Critical Roadmap to Success

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Every successful project starts with a common factor – a plan. Whether it’s the construction of a new house, the implementation of an enterprise-wide system or the creation of a piece of art, a plan is critical to a project’s success. The same is true for projects that involve change management. Getting people ready, willing and able to work in new ways requires a plan.

Planning change management activities requires you to do two things: (1) assess your needs and (2) develop a plan.

- 1. Assessing Needs:** Identifying stakeholders, evaluating if leaders are aligned around a common vision and estimating how much effort will be required to help people understand and adopt a change are necessary to steps in defining the change management activities that should occur.
- 2. Developing a Plan:** Developing a change management plan requires you to map out communications, leadership involvement and workforce transition activities. An effective plan also identifies who will perform these activities and when they should occur.

### A Few Change Guides Planning Tools

Two of our frequently used “Planning” tools are shown below.

**The Stakeholder Analysis** defines the people who are critical to a successful change and assesses their current and desired levels of support.

✂ The Tool: Stakeholder Analysis								
Name	Role & Function	Issues Concerns	Contact	Awareness	Understanding	Desire	Adoption	Internalization

**The Change Management Workplan** lists the change management activities, estimating effort required and tracking progress.

✂ The Tool: Change Management Work Plan						
Task Name and Steps	Start	Finish	Estimated Hours	Project Member(s)	% Done	Concerns / Issues
<b>Analyze stakeholders (use Stakeholder Analysis Tool)</b>						
Gather additional information about stakeholders if necessary						
Confirm stakeholder analysis results if necessary						
<b>Assess Change Readiness (use Change Readiness Audit Tool)</b>						
Conduct quick hit activities based on the Change Readiness Audit to improve change readiness						
Define the areas of most importance for the change based on the Change Readiness Audit results						
Determine which tools will be most appropriate for this project as we know it today						
Communicate results of the Change Readiness Audit back to the organization						

**Why is “Planning” So Important?**

All too often, people make the mistake of skipping the “plan” phase. Instead, they jump feet first into doing the work they think should be done to get people on board with a change. While taking the time to engage in thoughtful planning does take time and resources, creating a plan is much more than an exercise. It’s the tactical roadmap to achieving the ultimate vision and goals of the project. Without a plan, you’re more likely to hit roadblocks and unnecessary detours. Don’t take shortcuts...take the time to plan!