

Change Planning Worksheet

Step 1: Unfreeze

Describe the change:

Conduct initial information meeting:

What changes are happening? (What by when)

Why is change necessary?

Address concerns:

How will I be impacted?

»

Is my job safe?

»

Will I have to learn new skills or do more work?

»

Step 2: Change

- » Communicate, communicate, communicate (*this is two-way communications, so listening is important*)
- » **Involve and Empower** team members through the process
 - Involve Team Members in How to Navigate the Change
 - Provide Resources
 - Train on New Processes

Step 3: Refreeze

- » **Measure** progress
- » Watch for **backsliding and workarounds**
- » Make the change part of the **firm's culture**
- » **Celebrate Successes!**



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