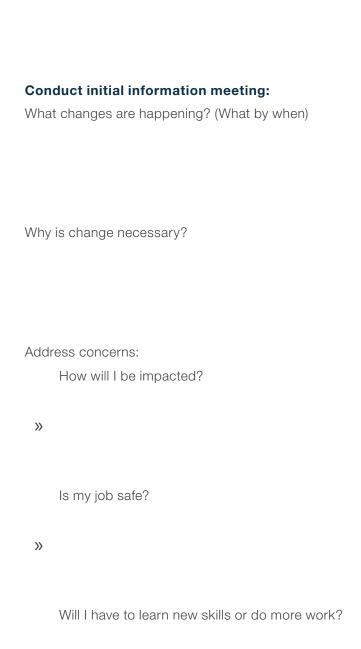


Change Planning Worksheet

Step 1: Unfreeze

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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!

