

Reading: Steps For Creating A Change Plan

Participative Approach

Involve employees and union representatives in decision-making and problem-solving during the creation of the change plan. Doing so will increase their understanding of the change and what it will take to make it work. Involve them by:

- Appointing an inclusive Implementation Team.
- Establishing task groups to handle special aspects of implementation or address problems.
- Calling on employees as subject-matter experts.
- Encouraging interdepartmental participation.
- Gathering feedback to track implementation.

Step 1: Define major activities and subactivities.

The first step in creating the change plan is to identify what major activities and subactivities are necessary to implement the blueprint of the change and to align the systems.

Consider these questions:

- What needs to happen to get the change up and running?
- What short-term strategies can be implemented to keep the day-to-day operations running smoothly?
- What short- or long-term solutions have been identified to align the infrastructure?

Step 2: Determine who is responsible for each activity or subactivity.

After you know what needs to happen, you can determine who will be responsible for each activity and subactivity. In most major change efforts, you will create an implementation management structure to oversee the process. This group or groups will be responsible for overseeing how these activities are accomplished. Creating this structure is discussed in the next task.

Step 3: Estimate the time and resources required to complete each activity and subactivity.

Work with those involved to determine how long it will take to accomplish each activity and subactivity. Keep in mind how long a similar activity has taken in the past. It is a good idea to slightly overestimate the time required to complete each activity in order to build in time for slippage or other contingencies.

As you look at each activity, make a comprehensive list of all the resources needed to accomplish it, such as people, materials, equipment, and facilities. At this point in your planning, you are listing categories or types of employees or consultants, not specific people. Also you are simply identifying types or categories of other resources.

As you estimate time and resources required, note all important assumptions you have made if revisions to the estimates have to be made at a later time. Consider resource pools from which

you can draw project necessities as well as any organizational policies regarding the acquisition or use of resources.

Step 4: Lay out the sequence of activities and develop a timeline.

Using the amount of time it will take to complete each activity, and laying out the sequence of the activities, develop a timeline or project schedule. One common pitfall in the implementation process is the failure to plan the sequence correctly. Asking what has to be done before something else can be done helps you avoid this pitfall.

In developing a timeline, consider:

- Overall priorities and the relative importance of activities.
- Uncontrollable or external events.
- Building in extra time.
- Milestones, or major project events.
- Overlapping activities.

The schedule is a communication tool. It keeps everyone coordinated. It should be easy to understand and be given to all people who need to be involved or informed. The timeline also serves as a valuable tool to keep tabs on implementation progress.

Step 5: Estimate costs.

At this point in the planning process, you should have most of the information needed to make an estimate of project costs.

- Estimate the costs for each activity and subactivity.
- List cost assumptions and constraints (for example, "The cost estimate assumes computers will be leased," or "We understand we can spend no more than \$50,000 for the rent of facilities").
- Decide how costs (particularly cost variances) will be handled and document these decisions. (Cost variance: when an activity requires more or less money than planned.)

Cost estimates should be detailed so the costs are clearly specified and you can easily defend what the change implementation will cost.

Step 6: Coordinate and update the change plan.

In updating the change plan, remember that planning for the change does not end at this point. It needs to be continuous throughout the change as the situation evolves and impacts can be seen.

Temporary structures may need to be set up for a time, then dismantled. You will need to continually monitor progress and make midcourse corrections.

Following are some tips for planning to monitor progress:

- ✓ Create opportunities to observe what is happening as the change gets underway; walk around and see for yourself.

- ✓ Plan to hold regular meetings with your work unit and other stakeholders to check progress, identify barriers, and discuss solutions.
- ✓ Don't assume that feedback about the change will come up through regular channels. Consider creating an ombuds-team made up of a cross-section of people in the organization whose sole purpose is to monitor how things are going, to keep an ear to the ground, and report back.

Remember also to keep all interested parties informed about the implementation plans. Implementation is the time when buy-in and commitment become the most important.