

Planning for change—worksheet

The questions below are based on Kotter’s eight steps to transforming your organisation (Kotter, 2000). Use this worksheet to build a structure that can help you to move sequentially through the eight steps.

1. Establish a sense of urgency

How will I communicate the urgency of this change?

Is this communication sufficient to convince at least 75 per cent of my managers that the status quo is more dangerous than the unknown?

2. Form a powerful guiding coalition

Who do I need on my change team?

Do these people have a shared commitment and enough power to lead the change effort?

3. Create a vision

What is my vision and how do I articulate it so that it will direct the change effort?

Can it be communicated in 5 minutes and will it inspire people to join in?

4. Communicate the vision

What channels and devices will we use to communicate the vision? How will we make sure we reach everyone involved in the change?

Am I going to be able to role model the behaviours associated with the new vision?

Who else could help us communicate the vision?

What extra support do we need with this step?

5. Empower others to act on the vision

What ideas do we have for removing or altering systems or structures that undermine the vision?
Will these ideas decrease the influence of powerful individuals who resist the change effort?

How will we encourage risk taking and non-traditional ideas, activities and actions?

6. Plan for and create short-term wins

How are we going to define and engineer visible performance improvements and recognise and reward employees who contribute to those improvements?

What risk is there that these short-term wins may not be executed quickly?

7. Consolidate improvements and produce more change

What are we going to put into place to embed the changes (people and processes)?

How am I going to promote the idea of this change beyond the initial implementation?

8. Institutionalise new approaches

What strategies will we use to articulate connections between new behaviours and the organisation's success?

What processes do we need to concentrate on to make sure the changes continue?

Kotter, J. P. (2000). Leading change: why transformation efforts fail. In H. B. Council, *Classics Compendium: 15 must read articles for managerial success*. Boston: Harvard Business School Press Corporation, pp. 122–32.