

# Change Management Checklist



## Identify the Stakeholders

Determine who will be impacted by the change and who needs to be involved in the process to ensure buy-in and support.



## Define the Change

Clearly articulate what is changing, why it's happening, and the intended outcomes.



## Create a communication plan

Develop a strategy for how, when, and what to communicate to each stakeholder group throughout the change process.



## Create a baseline assessment

Evaluate the current state to understand where you're starting from and set measurable benchmarks.



## Create a change plan

Outline how to guide individuals and teams through each stage of the change, including key supports and adjustments.



## Execute the plan

Implement the transition strategies, monitor progress, and remain open to feedback and course correction.



## Execute training

Deliver targeted training to build confidence and capability while the project plan unfolds. Done in tandem with project plan.



## Complete a final assessment

Evaluate the success of the change initiative, gather feedback, and document lessons learned for future efforts.

**Remember:** Stay flexible throughout—rigidity can derail even the best-laid plans in the face of evolving needs and real human reactions to change.