



KAW Consulting

Consultants in Human Resources

Major Change Initiatives: Key Planning Questions

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Planning for Major Change Initiatives

Note: This sample is for evaluation purposes only. It provides a list of questions that need to be considered when planning a major change initiative. For assistance in developing a plan based on these and other questions unique to your organization, contact **KAW Consulting** directly.

Introduction: For a major change initiative to succeed, it's vital that the planning for it addresses key strategic, leadership and operational issues. Projects that fail often don't sufficiently address these areas and find that they didn't have a broad enough definition of the project's scope, didn't include all the necessary activities, or have the needed resources to make the initiative a success.

Following is a list of questions to ask when developing the strategy for a major change initiative to help ensure your plan addresses the needed areas.

Strategic

- Is there a clear Vision for the initiative that clearly states why it's being done, the reasons why it's critical for the organization's continued success, the benefit of doing it, and the probable impact of it on the organization?
- Can the Highest Executive in the organization clearly explain this?
- Is the definition of the initiative's scope broad enough to encompass what really needs to be done?
Example: Does the initiative require a re-examination and redesign of existing business processes as well as integration of new technology? Will there be major impacts on staffing, relationships between departments, need for better teamwork, etc. as a result of the initiative?
- Does each member of Executive Leadership have a clear understanding of the initiative's purpose, strategic intent and true impact on their segment of the organization, and their role in making this a success? Many times this is only vaguely understood and the result is a lack of communication down the line that this effort is "critical" and the needed attention be paid to it as one of the "key things we're working on".
- Is this initiative's success reflected in key organization strategic goals and performance criteria at the executive level?
- Are the initiative's resource requirements understood and included in the organization's capital and operating expense budgets?

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- Is the status of the initiative included in the organization's key monitoring systems that evaluate progress against key strategic goals?

Leadership

- Who has overall responsibility for implementation of this initiative? Is this clearly communicated and understood by the organization's Executive and Senior Leadership?
- Does this responsibility cover all the needed areas such as business impact identification and process redesign, user training, system implementation and adoption planning versus just system development and testing?
- Does the initiative have a Leadership Team composed of representatives from impacted departments/stakeholder areas with responsibility and accountability for successful implementation in their Department?
- Do these Departmental representatives clearly understand their roles and responsibilities? Is the success of this initiative a key part of their performance criteria?
- Do the Departmental representatives have enough organizational authority to ensure the initiative gets the needed attention in their department/area?
- Do the various Departments and Stakeholders have this initiative and its success as one of their key performance goals? Are the necessary resources included in their Departmental operating budgets?

Operational

- Does the initiative's overall project plan include all the major activity areas such as business impact analysis, process redesign evaluation, staffing and culture change needs, communications, implementation planning, user training, etc. versus just system design, testing and implementation?
- Key Question to Answer: What are the areas someone might say "This is clearly a major area we overlooked in our planning..." if the project failed. These are all activity areas that need to be in your plan.

Example: Departments did not really understand the impact on their operations and proactively get ready for it, and experienced substantial difficulties once new technology started up. When looking at the initiative's overall plan after the fact, it didn't include enough attention to departmental business impact analysis as a major phase.