Ease in Change • Change management and project-planning tool

EXPLORE
You’ve got an idea. Information-gathering and discussion happens in these stages, and you may consider using a PDSA to test an idea.

Ask:
- What is the opportunity, and how does it connect to our organizational strategies?
- Why are we doing this? What problem are we solving? What are we trying to accomplish?
- Whose work would be impacted by this change?
- What is the final goal?
- Are we ready? Is the timing right for this?
- Have we brainstormed solutions?

ENGAGE
Does this call for a formal proposal? Decide here.

Ask:
- What do others think/feel about this?
- Who are the partners and champions for this?
- What do opposing viewpoints say?
- Who is impacted, and what do those people say?
- Is there momentum to move this forward? Is this a priority for your team or for others who would be impacted?
- What level of energy will this require?

EXAMINE
Use this stage to develop and carry out an action plan.

Do you need a formal proposal to move this? The answer may be yes if this idea:
- Comes with significant financial impact (including in use of employees or other resources)
- Affects more than one department
- If you answered “yes” to these questions, start the proposal process.
- If you don’t need a proposal, talk with your leader about how to get the idea moving.

EXECUTE
Now it’s time to ensure excellence. Follow these steps:

- Develop an action plan, clarifying project description, team members, goals, timelines, boundaries, risks, and resource requirements.
- Communicate to others, sharing the plan and the vision. Update frequently.
- Develop training tools, and train as needed.
- Ensure employees have opportunities to be involved, that problems are addressed, and that successful steps are celebrated.

ENSURE EXCELLENCE
After the plan is in place, evaluate its effectiveness.
- Determine whether measures are being met.
- Hold accountability for performance and compliance.
- Evaluate participants’ experience.
- Determine whether purpose remains clear.
- Provide support and training as needed.
- Improve and adjust as needed.
- Maintain.