

SHARED SERVICES TEAM

Document Name: Change Readiness Checklist

Usage Guidance

Toolkit materials should only be used with due consideration to the context and requirements of the programme in question. Materials should not be directly applied 'off the shelf.'

CATEGORY DESCRIPTION

1. *Example material* – The tool has been provided by a single public or private sector organisation, or an external forum that has not been moderated by the Shared Services Team. It represents one possible approach to a given shared service activity, and can be used by Toolkit users as an example / reference aid.

2. *Co-developed material* – The tool has been produced through the collaboration of the Shared Services Team and one or more public sector organisations and / or private sector organisations. This tool Provides a jointly developed approach to a given shared services activity, and can be used by Toolkit users as an example / reference aid.

3. *Output Templates* – These set out what is typically included in an output of this name. They have been created as part of the development of the toolkit based on experience and best practice from other programmes and project methodologies. However, your organisation may already have a set format and template for you to use.

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Change Readiness Checklist

Purpose

This checklist is designed to help you and the ERP team undertake an initial assessment of how ready your service is for ERP. The information you provide here will help us ensure that you have the right level of support to help you in your role as service champion.

How to use the checklist:

1. First answer each question in column A - **yes, somewhat or no**.
2. If you answer **somewhat or no** in column A, please make a rough assessment of what the impact on the ERP programme might be in Column B.

A			B		
Status			Impact on Project		
Yes	Some what	No	Directly affects project delivery	May affect project delivery - could become serious	Minimal/no effect on project

Leadership

Does your Head of Service understand and give visible support to ERP

Is the Senior Management Team demonstrating commitment to ERP

Have the SMT expressed any concerns about ERP?

Does ERP align with other initiatives and priorities within your service or are there conflicts?

Organisational discipline

Do you feel that you have been given the authority to represent you service?

Do you have a mechanism for reporting to and receiving feedback from the senior management team?

Are you clear about your role as service champion?

Has your service put in place any mechanism for managing and monitoring the ERP implementation?

Continued 



Communications and stakeholder management

A Status			B Impact on Project		
Yes	Some what	No	Directly affects project delivery	May affect project delivery - could become serious	Minimal/ no effect on project

Has your service undertaken a stakeholder analysis in relation to ERP?

Does the service understand what the impact of ERP will be and how it will manage people through that?

Does your service have a communication plan in place for ERP?

Do you already have effective communication vehicles in place?

Green	Grey	Red	Red	Grey	Green
Green	Grey	Red	Red	Grey	Green
Green	Grey	Red	Red	Grey	Green
Green	Grey	Red	Red	Grey	Green

Promoting the right culture

Is there a culture of involving staff in any change initiative in your service?

Are there mechanisms already in place for staff to input/give feedback collectively?

Are there mechanisms already in place for staff to input/give feedback individually (eg 1:1's, open management approach?)

Do staff feel that managers listen and respond to their views?

Green	Grey	Red	Red	Grey	Green
Green	Grey	Red	Red	Grey	Green
Green	Grey	Red	Red	Grey	Green
Green	Grey	Red	Red	Grey	Green

Gaining ownership of benefits

Are you personally clear about the benefits that ERP will bring to your service?

Are you/your senior management team clear that the service will be accountable for realising the benefits of ERP?

Do you feel confident that you are able to advise on who should be involved in identifying and delivering benefits?

Do you have mechanisms in place to enable you to involve operational staff and managers?

Green	Grey	Red	Red	Grey	Green
Green	Grey	Red	Red	Grey	Green
Green	Grey	Red	Red	Grey	Green
Green	Grey	Red	Red	Grey	Green

Name: _____

Date: _____

Service: _____

Tel: _____

THE CHANGE MANAGEMENT STAR

United Leadership

- Clarity of purpose & outcomes
- Aligning purpose, strategy and operations
- Compelling vision
- Allocate sufficient resources

Promoting the Right Culture

- Ensure a 'fit' between culture & what you want to achieve
- 'no blame'; emphasis on learning
- Openness & involvement

Integrated HR Plan

- Job design
- New competencies
- Learning & Development
- Rewards & incentives
- Effective appraisal framework



Organisational Discipline

- Structured approach to managing change programme
- Benefits & risk management
- Performance management - ensuring decisions are implemented at all levels & performance is monitored

Gaining Ownership of Benefits

- Mapping & selling benefits
- Clarify ownership & accountabilities
- Involving operational managers

Communications and Stakeholder Management

- Opportunity to change the culture
- Hearts & minds
- Identify & manage key stakeholders
- Address issues & concerns