

To effectively launch your change initiative, consider the topics in this checklist. Check those topics that you will use to plan your launch strategy and work. Depending on the complexity and status of your initiative, you may need to take all or just some of these actions. If you are beyond the launch stage, review this list for actions that may still provide benefit to the smooth change leadership of your initiative. The Task numbers listed at the end of many of the topics refer to the specific Task in [The Change Leader's Roadmap \(CLR\) Methodology](#). If you are familiar with the CLR methodology, you can explore the guidance contained in each Task. If you have not yet been trained in the CLR, all Tasks are discussed in [The Change Leader's Roadmap: How to Navigate Your Organization's Transformation book](#).

## ☐ Identify the Sponsor

- ☐ Ensure alignment of role and launch requirements with peer leaders
- ☐ Set expectations and clarify sponsor's role in launch strategy development (*Task I.A.2*)

## ☐ Determine Change Governance (*Task I.A.2 and Task I.E.3*)

- ☐ Name and tailor Change Leadership roles and responsibilities (Sponsor, Change Process Leader, Executive Team, Change Leadership Team, Initiative Lead/Work stream lead, Project Manager and team, Change Consultant) (*Task I.A.2*)
- ☐ Clarify any external consulting role and deliverables (e.g., content solution, people strategies, process oversight?)
  - ☐ Ensure clear interface with internal consultants or team members
  - ☐ Clarify meeting rhythm with all change leadership roles
- ☐ Ensure leadership commitment and alignment to the governance and initiative requirements (*Task I.D.3*)
- ☐ Determine the structure and work flow among roles and teams (*Task I.E.3*)

## ☐ Launch the Change Leadership Team (*Task I.A.3, I.D.5*)

- ☐ Determine initiative team Charter and deliverables
- ☐ Clarify decision-making roles, process and decision styles (*Task I.E.3*)
- ☐ Establish team ground rules and team culture (*Task I.F.1*)
- ☐ Secure agreement with sponsor on Launch Deliverables to be produced

☐ **Launch the Change Leadership Team (*Task I.A.3, I.D.5*) (CONTINUED)**

- ☐ Clarify interface with normal business/operations governance (*Task I.E.3*)
- ☐ Secure commitment from sponsor to adequate resources as needed (*Budget: Task I.E.11; and Capacity: Activity I.C*)
- ☐ Secure commitment to communications and engagement strategy/principles (*Tasks I.E.8,9*)

☐ **Clarify Initial Guidance on this Change Initiative (*Activity I.B*)**

- ☐ Share initial perspectives on why the initiative is needed; risk of not proceeding
- ☐ Clarify initial direction and outcomes: Expected business benefits and Value Proposition
- ☐ Outline high-level scope and leverage points (more detail will come from building a Case for Change)
- ☐ Identify any known Boundary Conditions (what is in and what is out of bounds; "givens")

☐ **Perform a Project Briefing/Establish Status of Change Initiative (*Task I.A.1*)**

- ☐ History
- ☐ Current state: Where is the initiative in the CLR process? Known roles, plans, deliverables
- ☐ Issues needing early attention
- ☐ Change Risk Assessment, followed by Sponsor, Change Process Leader and Change Leadership Team committing to lead this effort differently and set up Conditions for Success (*Task I.F.2*)

☐ **Design Phase I Process (*Task I.A.5*)**

- ☐ Determine who leads, participates, facilitates in the Phase I work
- ☐ Design working sessions to produce Phase I deliverables
- ☐ Build Change Leadership competencies: Offer change education (*Activity I.D*), including:
  - ☐ Critical Focus Areas (Content, People, Process)
  - ☐ Three types of change and implications for this initiative
  - ☐ Overview of The Change Leader's Roadmap (CLR) Model
  - ☐ Conscious Change Leader Accountability Model/Importance of Mindset and Culture
  - ☐ Importance of Course Correction and Conditions for Success (*Task I.F.2, I.F.5*)

## ☐ Design Phase I Process (*Task I.A.5*) (CONTINUED)

- ☐ Develop Case for Change: Why Change? (*Activity I.B*), Urgency, (*Task I.B.7*) and Initial Scope and Boundary Conditions (*Task I.B.1, I.B.4, I.B.5, I.B.6, I.E.4*)
- ☐ Identify Desired Outcomes/Vision (*Task I.B.1*)
  - ☐ Determine metrics as relevant (*Task I.F.8*)
- ☐ Design process for how to develop the initiative's Change Strategy and how it will be used (*Task I.E.1 and all of Activity I.E*)

## ☐ Identify Initiative's Stakeholder Map

- ☐ Who will be impacted by the change; who needs to be engaged in it in some way?
- ☐ Whose needs do you have to keep in mind as you proceed? (*Task I.A.4 and I.B.6*)

## ☐ Clarify Project Operations

(Change Leadership Team only at this point; Project Team when established), including:

- ☐ Leadership and agenda management
- ☐ Cadence of meetings (*Task I.F.4*)
- ☐ Project information management (*Task I.F.4*)
- ☐ Temporary Infrastructures (*Task I.F.7*)
- ☐ Determine Change Initiative review process, cadence, and tools
  - ☐ Clarify sponsor and executive expectations for what will be reviewed, how often
  - ☐ Design the review process and roles
  - ☐ Identify the tools to be used for initiative review, making sure they cover Content, People and Process issues
  - ☐ Design process to ensure the data from the tools provide value to the design of the change process
  - ☐ Determine change initiative course correction process and strategy for deployment (*Task I.F.5*)

## ☐ Develop Initiative Kick-Off Communications Strategy, including:

- ☐ How to develop key messages and communication delivery, engagement of stakeholders and desired outcomes from this launch communication. (*Task I.E.9*)