**Change Assessment**

**Description**

A tool for measuring change capability and for addressing the specific challenges faced by the change team.

**Purpose**

This tool delivers a graphic representation of the degree to which each change phase has been addressed at any given point during a change initiative. Thus, the tool enables the team to focus on those change phases that need attention at that time.

In its initial application, the tool can be useful in:

* Assessing the overall Change capability of the organization or team
* Identifying change strengths in the organization that can be leveraged for change initiatives
* Identifying Change improvement opportunities in the organization and determining how to pursue them
* Developing an initial baseline for the team’s change capabilities

For many teams, this is an eye-opening exercise which helps them chart a new course for the change initiative they are working on. At a minimum, the tool should provide the team with an opportunity to confront and deal with current habits, beliefs and practices around the cultural aspects of change.

Throughout the change initiative, the tool can be useful in:

* Identifying areas the team should focus on improving and determining how to do so
* Tracking changes in the team’s change capabilities throughout an initiative

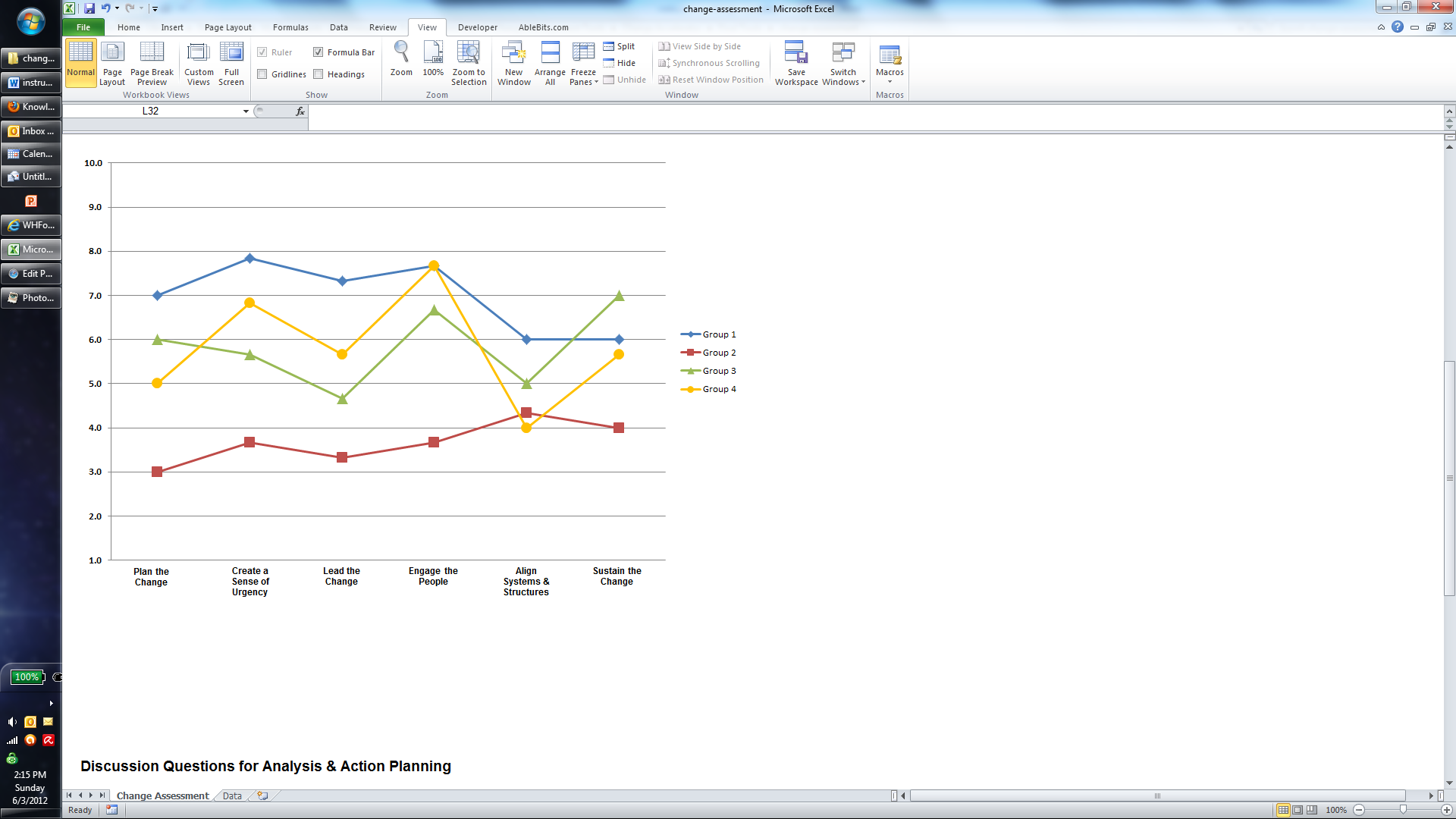
**Timing**

The best initial application of this tool is during the team’s start-up and introduction to managing the change this initiative is creating.   
  
As part of the ongoing assessment of a team’s capabilities, it should be applied at key team milestones. Best practice is to use it at regular intervals to keep the team focused on the change phase.

**Steps**

1. Have each team member rate and record the appropriate questions for each of the phase.
2. Capture the team’s ratings for each phase, preferably by getting consensus on the scores for each phase rather than by calculating a mean or median. Discuss the reasons behind the variances between the highest and lowest rating for each phase.
3. Input the scores for each phase on the **Change Assessment**. This will produce a *Change Profile* (see illustration below).
4. Analyze the results – where there is alignment and misalignment and where there are low ratings – using the Discussion Questions for Analysis and Action Planning.
5. Develop a plan of action for addressing those phases which need attention at this time.

Example of a *Change Profile* (output from the Change Assessment)



**Tips**

* Although the initial assessment is typically done during a workshop or meeting, subsequent team assessments can be done between meetings. The analysis can then be completed before the next team meeting, leaving more time for the team to focus on the ratings and what to do about them.
* It can be useful to keep the team’s self-assessment posted at team meetings as a reminder of what it has to improve, both in developing and in carrying out its **Action Plan**.
* Consider referring to the **Change Assessment** questions as the team builds its **Action Plan** and carries out its work, to confirm that the team is “covering its bases.”