



The Personal Change - Management Plan Workbook

Change Better: Survive – and Thrive – During Change
at Work and Throughout Life

Name: _____

Step 1 Worksheet: Defining The Desired State

The Change: _____

Use this worksheet to help you define your desired state.

- 1. Collect information about the desired state.** Answer these questions as best you can.

- What do I know about the desired state?
- What don't I know about the desired state?
- What do I like about the desired state? Why?
- What don't I like about the desired state? Why?
- What parts of the desired state, if any, are negotiable?
- How much will I be able to influence the details in the desired state?

- 2. Picture yourself in the future. Use visualization to determine how the change would take shape.** What does “a day in the life” of the desired state look like?

- Where am I?
- What am I doing?
- Who is here with me?

- What skills do I have?

- What tools do I use?

- What am I thinking?

- What am I feeling?

3. Analyze the information you have collected about the desired state. With this information, you should have a clearer picture of the desired state. Now you are in a better position to analyze it and determine how you feel about going to what may or may not be a desirable desired state.

- What conclusions do I draw from the answers to these questions?

- Do I have enough information?

- If so, what is the information telling me about the desired state?

- If not, what more do I need?

- What, if anything, can I do to make the picture clearer?

- What, if anything, can I change in those elements of the desired state that I don't like?

4. Design an action plan to address the issues that will impact the desired state.

- If I need more information, where do I go to get it?
 - Whom do I need to go to?
 - How will I ask for the information?
- What will I do if I don't get the information I need?
- Whom will I share this information with?
- What do I want from those I share it with?
 - Affirmation?
 - Actions?
 - Sympathy?
- If I have concerns about the desired state where do I go for help in either changing it or accepting it?
- How can I use the work I have done here to prepare the request I want to make about my need?

Step 2 Worksheet: Assessing The Current State

The Change: _____

Use this worksheet to help you assess the current state and understand the reasons for the change as well as the issues that may make it difficult to leave.

1. Collect information about the current state. Answer these questions as best you can.

- What do I know about the current state?

- What don't I know about the current state?

- What do I like about the current state?
 - What do I like about the current state for myself?

 - What do I like about the current state for others?

 - What do I like about the current state for the organization (if the change is work related)?

- What do I like about the current state but am concerned about?

- What don't I like about the current state?

- Is the current state no longer satisfactory?

- Is the current state becoming uncomfortable?
- If so, how uncomfortable?
- What is the source of that discomfort (or even pain)?
- What would happen if there were no change?
- How long can things stay the way they are?

2. Analyze the information you have collected about the current state.

- Which is more attractive: the current state or the desired state? Why?
- What would I need in order to change my answer?
- More information? If so, what information?
- A change in the current state? A change in the desired state?

3. Design an action plan to address the issues that will impact the current state.

- If I need more information, where do I go to get it?
 - Whom do I need to go to?

- How will I ask for the information?
- What will I do if I don't get the information I need?
- Whom will I share this information with?
- What do I want from those I share it with?
- Affirmation?
- Actions?
- Sympathy?
- If I have concerns about the need to leave the current state, where do I go for help to get that understanding?
- How can I use the work I have done here to prepare the request I want to make about my need?

Step 3 Worksheet: Determining if there is a path through The Delta State

The Change: _____

This worksheet will help you to identify what is known about the sequence of steps needed to get from the current to the desired state.

- 1. Collect information about the plan for the delta state.** Answer these questions as best you can.
 - Is there a plan?
 - Who designed the plan?
 - Who is responsible for implementing the plan?
 - What role do I play?
 - How do I (or others) measure progress through the delta?
 - How will I be kept informed of that progress?
- 2. Analyze the information you have collected about the delta state.** Examine your answers to determine your level of satisfaction with the planning process.
 - What conclusions do I draw from the answers to these questions?
 - Do I have enough information?

- If so, what is the information telling me about the plan?
- If not, what more do I need?
- What, if anything, can I do to make the picture clearer?
- What, if anything, can I change in those elements of the plan that I don't like?

3. Design an action plan to address the issues that surfaced in your data collection and analysis.

- If I need more information, where do I go to get it?
 - Whom do I need to go to?
 - How will I ask for the information?
- What will I do if I don't get the information I need?
- Whom will I share this information with?
- What do I want from those I share this information with?
 - Affirmation?

- Actions?

- Sympathy?

- If I have concerns about the plan or the lack of a plan, where do I go for help in either changing it or accepting it?

- How can I use the work I have done here to prepare the request I want to make about my need?

Step 4A Worksheet: Assessing the History of Previous Changes in your Personal Life

The Change: _____

This worksheet will help you determine to what degree your previous experience with change in your personal life will impact your ability and willingness to make the change you are facing.

1. What is your personal experience with change?

- What changes have I tried several times and failed at achieving?

- Why did this happen?

- What changes did I have to try several times before I succeeded?

- Why were they difficult?

- What lessons have I learned from this history?

2. Analyze the information you have collected about your personal history with change.

- Is my previous experience with change getting in the way of my ability to change?

- If so, how big an issue is this history and the lessons I have learned from it?

3. Design an action plan to address how that history has affected your ability and openness to change at work.

- If I need more information, where do I go to get it?
 - Whom do I need to go to?
 - How will I ask for the information?
- What will I do if I don't get the information I need?
- Whom will I share this information with?
- What do I want from those I share it with?
 - Affirmation?
 - Actions?
 - Sympathy?

Step 4B Worksheet: Assessing the history of previous changes at work

The Change: _____

This worksheet will help you determine to what degree your previous experience with change at work will impact your ability and willingness to make the change you are facing.

1. What is your experience with or knowledge about how changes at work have happened in the past?

- What have the changes been? Can I name them?

- What do people affected by the change say about it?

- How do these stories affect my concerns about the current change?

- Is my level of confidence in the potential success of my change lower as a result of my past experience?

2. Analyze the information you have collected about the history of change at work.

- In analyzing these changes, can I find any particular pattern, for example, things that were consistently missed or not done well?

- Will these experiences be a source of potential resistance to the change today?

3. Design an action plan to address how that history has affected your ability and openness to change at work.

- If you choose to support the change and become a partner in the change process, you can make the organization aware that there is an issue with change history and seek assurance that this change will be different.
- What are my concerns?
- Who needs to know about my concerns?
- How do I share that information without creating defensiveness or resistance to the message?
- What, exactly, do I need in order to be confident that this change will be different?
- What would reassure me that this change will be done differently?

Step 5 Worksheet: Assessing the Impact Multiple Changes

The Change: _____

This worksheet will help you determine to what degree multiple changes will impact your ability and willingness to make the change you are facing.

1. Collect information about the impact of many changes happening at the same time.

- Make a list of all the changes going on in my life.

- At work

- In my personal life

2. Analyze the list of changes.

- Are there too many going on at the same time? If so, why?
- Does it put a strain on me? Why?
- Are any of the changes similar?
- Are any of the changes conflicting in their desired states?
- Do any of the changes depend upon another one to happen first?

- If I needed to, which changes could I stop or alter on my own?

3. Design an action plan to address the impact of multiple changes happening at once.

- What can I do about the following?
 - The number of changes happening simultaneously?
 - Conflicting changes?
 - Overlapping changes?
- Whom do I need to talk to?
- What do I want to ask of these people?
- What will I do if there is no relief from these multiple changes?

Step 6 Worksheet: Determining the cost of The Delta State

The Change: _____

Use this worksheet to see if things might get worse before they get better and if there is anything you can do to reduce this possibility.

1. Collect information about the cost of the delta state.

- What, if any, is the price of changing?

- What is the time lost?

- What is the money lost?

- What is the quality of my life lost?

- What is the quality of my work lost?

2. Analyze the information you have collected about the cost of the delta state.

- What are the consequences of these costs?

- Is the cost worth the effort?

3. Design an action plan to address the issues you have identified.

- To what degree can the cost be lessened?

- Can the cost be reduced by better planning?

- Can the cost be reduced by finding more support?

- Can the cost be reduced by taking more time to change?

- Who can help me lessen the cost?

- If the cost can't be lessened, whom do I need to communicate to about the cost?

- How will I share this information with those who need to know?

- How can I use the work I have done here to prepare the request for more information?

Step 7 Worksheet: Figuring out what role you and others play in The Change

The Change: _____

Use this worksheet to identify who plays what role in your change and how well that role is being played.

1. Identify the sponsor, change agents, and other targets of the change.

- Who is the primary sponsor of this change, the person with the authority to say, "Do it"?
- Are there other sponsors as well? Who are they?
- Who are the change agents?
- Are there other targets of the change besides me?

2. Analyze the way people play the roles they own.

- What do I need from the sponsor(s)? (*Hint: Review worksheets 1–6 for the answer to this question.*)
- Does the sponsor understand what is required?
- Does the sponsor understand what is required? Does he or she demonstrate a willingness and ability to do what is required?
- What do I need from the change agents? (*Hint: Review worksheets 1–6 for the answer to this question.*)
- Do the change agents understand what is required? Do they demonstrate a willingness and an ability to do what is required?

- Do I understand my role and responsibilities as a target of this change?
Am I willing and able to do what is required?
- What is that requirement?
- If I am not willing, why not?
- If I am not able, why not?
- What are the consequences if the sponsor does not do what is required?
- What are the consequences if the change agent does not do what is required?
- What are the consequences if I, the target, do not do what is required?

3. Design an action plan to outline what you need from the sponsor, change agents, and other targets.

- Who will I approach first, the sponsor or the change agents?
- How will I ask for what I need from them?
- What will I do if I get what I need?
- What will I do if I don't get what I need?

Step 8 Worksheet: Exploring and understanding your feelings about The Change

The Change: _____

In addition to the factual analysis you complete, this supplemental worksheet, done as you complete the current, desired, and delta state worksheets, may help you to gain some insight into your feelings. With the insight you gain through this worksheet, you will be able to identify what you need to do to address your emotional issues.

Answer these questions, and identify the actions you can take to deal with your emotions.

The Question	The Answer	The Action Step
Does anything cause me to feel upset about leaving the current state?		
Does anything cause me to feel upset about being in the desired state?		
Is there something about the change that makes me angry?		
Why am I angry?		
Is there something about the change that makes me sad?		
Why am I sad?		
What am I feeling right now when I think about not being in the current state anymore?		
Why do I feel this way?		
What am I feeling right now when I think about being in the desired state?		
Why do I feel this way?		
When I think about going through the delta state of this change, what do I feel?		
Why do I feel this way?		

Step 9A Worksheet: The Information Plan

The Change: _____

Use this worksheet to determine what information you have and what you still need. Review the work you did in the first eight steps of the Personal Change-Management Plan to assemble this information and answer the following questions.

1. What do you need to know?

- What more do I need to know about why this change is being made?

- What more do I need to know about what the desired state will look like?

- What more do I need to know about how the change is going to be deployed?

- What more do I need to know about how this change will fit with other changes happening at the same time?

- What more do I need to know to allay my concerns that this change may end up looking like previous, unsuccessful, or painfully deployed changes?

- What more do I need to know about the commitment of leadership?

- What more do I need to know about the skill of the change agents?

2. How will I go about getting this information?

- Whom do I need to talk to?

- When?

- Alone or with others?

- How will I shape my questions?

3. What could be difficult about my plan to get the information I need?

- Why would anyone be reluctant to give me the information I need?

4. How will I overcome obstacles?

- Is there someone else I can use as a go-between?

- How can I package my request for the information in a way that will reduce this obstacle?

- Have I done a good job of explaining why I need this information?

5. How will I make sure the right people hear my issues, concerns, and ideas?

- Who should hear my issues, concerns, and ideas? Leaders?
Change agents?

- Why would they be open to hearing from me?

- What would make them reluctant to hear from me?

- Would it be better if I enlisted others to join me in my attempts to get the right person(s) to listen to me?
- How do I package my concerns, complaints, and issues so they will be welcomed by people who, as the leaders and the change agents, are probably already well steeped in the change and very ready to move on?

What do I need to know?	How will I go about getting this information?	What could be difficult about my plan to get the information I need?	How will I overcome obstacles?	How will I make sure the right people hear my issues, concerns and ideas?

Step 9B Worksheet: The Rewards Plan

The Change: _____

Use this worksheet to determine the benefits of making the change.

What are the sources of personal satisfaction or reward for me in the current state?

Formal Rewards:

Informal Rewards:

What will be the sources of personal satisfaction or reward for me in the desired state?

Formal Rewards:

Informal Rewards:

How do I go about making sure the people who can change the rewards know about my needs

Step 9C Worksheet: Completing The Skill Development Plan

The Change: _____

Use this worksheet for a workplace change to determine any skills that are necessary for the change.

What do I need to learn to do differently?

What is the company doing to help me develop this skill / knowledge?

How will I be measured?

What do I need to learn to do better?

What do I have to do on my own to reach the desired level of competency?

Step 10 Worksheet: Building The Change Plan

The Change: _____

Use this worksheet to create an action plan for change.

Action Step	Date	Date	Date	Date



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