

How to use this Business Transformation Toolkit

Document Control

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This toolkit is fully interactive – see ReadFirst Document to understand the functionality of this toolkit.

The scale of transformational change can be daunting for those who are not used to it.

- What do I need to do?
- In what order do you undertake the change management activities?
- What are the core principles of change management?
- What are the components of business transformation?
- What does transformational change mean?

This toolkit will lead you through the basic building blocks of the '**business change lifecycle**' through a series of guidelines, templates, questionnaires and checklists.

This toolkit accompanies the Managing Business Transformation book which has a four stage business change lifecycle:

- **Understand** the change
- **Plan** for the change
- **Implement** the change
- **Embed** the change

You can select those activities appropriate to your situation and change and rename them to fit in with your organisation.

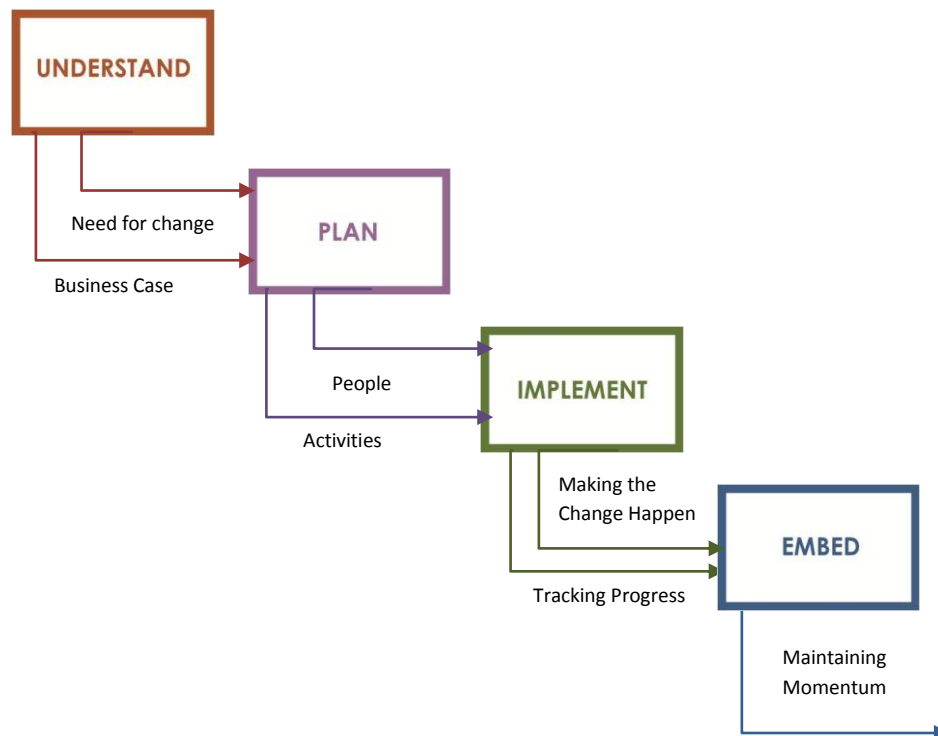


Diagram 1 – The Business Change lifecycle

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Within the toolkit you will find the following types of document to support these activities:

Guidelines

Guidelines will set the context for the activity, explaining:

- Why a step, technique, plan is important;
- How it will be used in the transformation and,
- Hints and tips to help avoid potential pitfalls.

Templates/models/agendas

These will save time by showing:

- Best practice formats.
- Examples of the factors to be considered when defining your context.
- Examples of useful tools and techniques.

Questionnaires

This method is for assessing progress and/or, the suitability of individuals for specific roles.

Checklists

A comprehensive list of activities, information and responsibilities used to check the quality and progress of the change activities.

See the contents table below:

Business Transformation Contents List

Business Transformation Contents List

Understanding the Change

[Understand-Images]

Need for Change

BTMS REC U1; Assessing Change Checklist
BTMS REC U2; Change Capability Questionnaire
BTMS REC U3; Change Definition Meeting Agenda
BTMS REC U4; Emotional and Rational Drivers Checklist
BTMS REC U5; Orientation Questionnaire
BTMS REC U6; PESTLE Analysis Checklist
BTMS REC U7; PESTLE Analysis Template
BTMS REC U8; Storytelling Checklist
BTMS REC U9; SWOT Analysis Checklist
BTMS REC U10; SWOT Analysis Template
BTMS REC U11; Vision Checklist
BTMS DOC U12; Vision and Storytelling Guideline

Business Case

BTMS U13; Benefits and Risks Assessment Model 1
BTMS U14; Benefits and Risks Assessment Model 2
BTMS DOC U15; Benefits Description Guidelines
BTMS REC U16; Benefits Description Template
BTMS REC U17; Benefits and Disbenefits Checklist
BTMS REC U18; Business Case Checklist
BTMS DOC U19; Business Case Guidelines
BTMS REC U20; Business Case Template
BTMS REC U21; Costs Checklist
BTMS REC U22; Investment Appraisal Checklist
BTMS REC U23; Risk Checklist
BTMS REC U24; Risk Management Workshop Agenda

Planning the Change

[Plan-Images]

Activities

BTMS REC P25; Blueprint Checklist
BTMS DOC P26; Blueprint Guidelines
BTMS REC P27; Blueprint Template
BTMS REC P28; Change Plan Checklist
BTMS REC P29; Change Plan Contents Checklist
BTMS DOC P30; Change Plan Guidelines
BTMS REC P31; Change Plan Template
BTMS DOC P32; Defining Levels of Plan Guidelines
BTMS REC P33; Management Dashboards Checklist

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BTMS DOC P34; Management Dashboards Guidelines
BTMS REC P35; Monitoring and Control Checklist
BTMS REC P36; Prioritising Change Activities Checklist
BTMS REC P37; Updating the Blueprint Checklist
BTMS DOC P38; Updating the Blueprint Guidelines

People

BTMS DOC P39; Change Agent Role Description
BTMS REC P40; Change Manager Questionnaire
BTMS DOC P41; Change Manager Role Description
BTMS REC P42; Change Sponsor Questionnaire
BTMS DOC P43; Change Sponsor Role Description
BTMS DOC P44; Communications Plan Guidelines
BTMS REC P45; Communications Plan Template
BTMS REC P46; Communications Timeline Model
BTMS REC P47; Contents of Communication Model
BTMS DOC P48; Flow of Communication Events Model
BTMS REC P49; Levels of Stakeholder Support Checklist
BTMS P50; Mapping Key Messages to Stakeholder Groups - Example
BTMS REC P51; Methods of Communication Model
BTMS DOC P52; Stakeholder Analysis Model
BTMS DOC P53; Stakeholder Engagement Guidelines
BTMS REC P54; Stakeholder Identification Checklist
BTMS REC P55; Stakeholder Identification Model
BTMS REC P56; Stakeholder Satisfaction Questionnaire

Implementing the Change

[Imp-Images]

Making Change Happen

BTMS REC I57; Areas to Investigate Checklist
BTMS REC I58; Change Readiness Questionnaire
BTMS REC I59; Change Team Effectiveness Questionnaire
BTMS REC I60; Decision Making Template
BTMS REC I61; Decision Making Tools Checklist
BTMS REC I62; Delegation Checklist
BTMS DOC I63; Delegation Guidelines
BTMS REC I64; Facilitation Checklist
BTMS DOC I65; Facilitation Guidelines
BTMS DOC I66; Focus Group Guidelines
BTMS REC I67; Focus Group Checklist
BTMS DOC I68; Interview Guidelines
BTMS REC I69; Interview Checklist
BTMS REC I70; Making Time for Change Checklist
BTMS DOC I71; Making Time for Change Guidelines
BTMS REC I72; Questionnaire Checklist
BTMS DOC I73; Questionnaire Guidelines
BTMS REC I74; Questionnaire Model
BTMS REC I75; Workshop Action Plan Template
BTMS REC I76; Workshop Agenda

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BTMS REC I77; Workshop Checklist
BTMS DOC I78; Workshops Guidelines

Tracking Progress

BTMS REC I79; Benefit Review Meeting Agenda
BTMS REC I80; Facilitator Questionnaire
BTMS REC I81; Participation and Enthusiasm for Change Model
BTMS REC I82; Participation Checklist
BTMS REC I83; Participation Satisfaction Questionnaire
BTMS REC I84; Procrastination Situation Questionnaire
BTMS REC I85; Procrastination Style Questionnaire
BTMS REC I86; Progress Review Meeting Agenda

Embedding the Change

[Embed-Images]

Maintaining momentum

BTMS REC E87; Abandoning old ways of Working Checklist
BTMS REC E88; Assessing the Progress of Change Template
BTMS REC E89; Tracking Competence Levels during Change Checklist
BTMS REC E90; Tracking the Acceptance of Change Checklist