

Culture and Change Management Checklist



This checklist is intended to be used with a structured approach to change management. Many of these actions may already be incorporated into that change management approach - missing elements may impact your change success.

Objectives of Culturally Intelligent Change

- Manage, minimize or avoid culture flashpoints that create change resistance
- Maximize the achievement of business objectives by using culture intelligence to drive sustainable change results

Key Culture Actions *that should be part of every culturally intelligent change project*

Completed:

1. **Assess the Culture & Climate, both qualitative and quantitative.** Identify and understand the current organizational culture and climate. This can be done through employee surveys, interviews, focus groups, observation, customer surveys where appropriate, and other internal research.
2. **Identify changes in specific norms and behavior** to target for successful change. Understand the shift in the underlying beliefs and assumptions that are necessary to support the behavior change. Determine what strengths in the culture can be built on to accelerate change.
3. **Clearly define success:** ensure the future state vision contains desired culture description, including the culture norms and behaviors required. Identify the role current culture plays in the change.
4. **Align core change team and leadership team;** ensure that everyone has a common understanding of the culture and climate. Review the cultural implications of the change. Get agreement on the behaviors that need to be modeled for change success.
5. **Use the Culture Assessment to inform the change impact and organizational readiness.** Identify how current culture will help or hinder the change. Use that to determine culture change risks.
6. **Use Culture & Climate insights to shape the Change Management Strategy,** especially the Communication Strategy and the Stakeholder Engagement Strategy.
7. **Prioritize Key Levers for Change** identified from Climate Assessment and ensure each change management component plan uses them to identify the culture actions relevant to that plan.
8. **Define feedback channels and loops to facilitate shared learning.** They may be included in the Communication Strategy/Plan or the Learning and Development Strategy/Plan, or another appropriate plan.
9. **Ensure there is a management system** in place to manage priorities, goals and consistent two-way communication as well as track key metrics and measures.

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Key Culture Actions, continued

Completed:

10. Leaders and Change Team understand and **demonstrate targeted behaviors**.
11. Evaluate impact of (norm and behavior) culture/climate changes and **adjust plans** based on what's learned at pre-defined points. Ensure that behavior changes are sustainable, confirm underlying shift in beliefs and assumptions.
12. **Communicate progress, recognize and reinforce new behaviors**. Celebrate where targeted behavior is contributing to successful change management and related outcomes.
13. **Surface and address gaps in behavior**. Understand beliefs and assumptions that surface through the process of change. Hold people accountable for targeted behaviors in a constructive manner.
14. Include culture-related learnings in lessons learned and sustainability plan.
15. Ensure there is **ongoing culture and climate assessment** to monitor targeted behavior and results. Ideally re-measure every 1 to 3 years.

The checklist identifies the actions that will increase your change management success by applying Culturally Intelligent Change. As Dr. Edgar Schein says, "If you do not manage culture, it manages you, and you may not even be aware of the extent to which this is happening." Lack of culture intelligence is the reason many excellent change plans fail. According to John Kotter, a top 10 watch-out when implementing change is "neglecting to anchor changes firmly in the corporate culture."

Next Steps:

As you review the checklist, if there is an action missing in your approach to change, add it. If you did not get a baseline measure of your culture (#1), you can still use an assessment to gather data on the culture which will enhance your change success. If you did not identify changes in specific norms and behavior to target for successful change (#2), there is no time like the present! Many change plans identify process behaviors like "use the new software system" but may not get at the deeper mindset shift required to anchor the behavior.

If you were able to check all 15 boxes, you are well on your way to successful and sustainable change. Your change is likely having a positive impact on the individuals and teams in your organization. Don't stop here. Document what you have learned, understand the results, and share the successes within your organization. Continue to find opportunities to apply Culturally Intelligent Change to your change initiatives, and keep in touch with us to share what you have learned.