



## Checklist: Building employee trust into change projects

For medium-sized organisations projects. Use this checklist to ensure your change project is focussed on establishing and maintaining employee trust that will facilitate employee support for change.

### 1. Establish the project charter

**Goal:** Ensure that the sponsor and other leaders can provide employees with a clear and credible description of a desirable project.

- ☐ Develop and approve a clear project charter setting out objectives, scope, and business benefits.
- ☐ Articulate a compelling vision that sets direction, even if operational details are still being developed.
- ☐ Identify an authoritative sponsor who will speak for the project.

### 2. Identify stakeholders

**Goal:** Identify all employees who will contribute to the project and who will be affected by it.

- ☐ Map all stakeholder groups likely to be affected.
- ☐ Identify those stakeholders who are:
  - subject matter experts or front-line staff who will contribute to analysis and requirements elicitation, and
  - otherwise affected by the project.

### 3. Assess project impact on stakeholders

**Goal:** Assess critical effects related to employment that will be of particular concern to affected employees.

- ☐ Determine if the project is likely to result in substantial role changes or employee redundancies.
- ☐ If role changes or redundancies are likely, determine the support measures to be offered to affected employees.
- ☐ Proposed support measures are documented and supported by senior management.

### 4. Develop initial project announcement

**Goal:** Provide accurate and relevant information to all affected employees to establish confidence and trust in the project goals and how the project will be undertaken.

- ☐ Identify major risks and uncertainties (including what is not yet known) and decide how these will be communicated.

- ☐ Decide the format of the initial announcement: Written information or meeting(s).
- ☐ Brief the sponsor in advance to ensure alignment of messaging.
- ☐ Develop information to be announced, including:
  - Project objectives
  - Project scope and exclusions
  - Expected benefits
  - Expected effect on stakeholders (role changes or redundancies)
  - Support services to be offered to employees affected by role changes or redundancies
  - High level process and key milestones
  - Estimated times for key milestones
  - Next steps
  - Risks and uncertainties
  - Other relevant information.

## 5. Plan and conduct a structured feedback process with stakeholders

**Goal:** Identify issues that are important to employees after the initial project announcement and demonstrate to employees that they will be listened to.

- ☐ Determine if feedback following the announcement should be sought via meetings or other means.
- ☐ Develop agenda or questionnaire to guide the feedback process.
- ☐ Establish process (meetings or other means) for employees to voice concerns or provide ideas relating to the proposed project.

## 6. Report outcome of the feedback process to employees

**Goal:** Demonstrate that employee feedback has been received and considered.

- ☐ Develop a written statement of the outcomes from the feedback process covering:
  - Key issues raised by employees
  - How that feedback will be incorporated into the project moving forward, including what will change as a result of feedback, but also explain why some suggestions cannot be adopted.
  - Next steps in the project.