Change initiative checklist

For most organizations, change is inevitable. When faced with stiff competition or industry disruptors, your client may decide it's time to try something new. Help them navigate change with this checklist.

1. Confirm the need for change.

- ☐ What business problem are you looking to solve?
- ☐ Why can't you solve this problem if you maintain status quo?

2. Assess your client's current business strategy.

- ☐ Read this e-book on the best way to assess a business strategy.
- ☐ Walk your client through the four types of business strategies.
- ☐ Determine what class of strategy the company is currently emphasizing.

3. Identify an appropriate change initiative.

- ☐ Revisit the business problem your client wants to solve.
- ☐ Survey all key stakeholders on what strategic statements they wish to prioritize.

4. Gain senior team alignment.

- ☐ Come to a consensus on which change initiative/s to pursue.
- ☐ Determine what class of strategy the change initiative falls under.

5. Predict future challenges.

- ☐ Determine if the senior team is a behavioral fit for the new class of strategy.
- ☐ Discuss what other challenges may come from implementing the change.