



Assessing the health of your change initiatives

Evaluate your change initiatives using
our six indicators of overall health.



Change initiatives can develop problems one day at a time...

Regardless of how well a change initiative is designed and mobilised, challenges can inevitably arise. An accumulation of challenges and issues is likely to jeopardise overall success.

Conducting a simple health assessment that examines the key success indicators serves as an effective means of identifying and promptly addressing any existing or potential problems.

This tool summarises the six essential indicators of the health of any change initiative, presented in a format that enables you to swiftly determine overall activity health and plan any necessary interventions.

How to use this resource

This tool includes a series of statements gathered under six headings. Taking each of the six areas separately, consider each of the statements and highlight those you feel best describe the current state of play across your change initiative.

Ideally, this should then be repeated by other stakeholders to gather their views. When all have completed this task, compile all the results onto a single summary version using three highlighter colours; one colour highlights statements that most or all agree with, a second colour denotes that some agree with the statement and a final colour shows where only one person agrees with the statement.

The overall pattern of highlighted statements then reveals two key elements: whether there is cause for concern based on the overall balance of highlighted statements across the three columns and whether the stakeholder group agrees on the issues identified.

A story from a PiC Team Member

Around 15 years ago we went skiing in France and after a couple of days my persistent cough worsened. My wife suggested I get it checked so I duly went to the local doctor in the ski village. He did a couple of basic tests. You know things are not quite right when they start looking at you in that concerned way and then re-checking notes.

I had always considered myself to be pretty healthy, however, that afternoon I found myself on a trolley in the local hospital with an ECG strapped to me, going on to spend the night as a patient as they did an initial assessment. I was discharged the following day with instructions to see a cardiologist when I got back. I duly did and after some investigations and treatment the issue was addressed. Left unchecked it could have been serious.

I continue to carry the learnings from that experience, applying them in life and in change delivery.

- *Things can appear healthy and yet still be misleading.*
- *Take note when there is an issue, it might be an indication there are greater underlying factors.*
- *What surfaces may or may not be a direct indicator (in my case it was not) but, in looking generally, other issues were found.*
- *Face up to the situation, take your medicine - things rarely correct themselves without intervention.*
- *Better to undergo regular checks. There is an increasing emphasis on preventative medicine designed to save lives and healthcare system cost. Change delivery is no different.*
- *Having a health check is not a sign of weakness, it is taking care of what is important.*



A simple self-assessment

This assessment covers the six key indicators of change-initiative health. Taking one indicator at a time, highlight the statement(s) you feel best describe your current change activity.



Cause for concern
Needs action to prevent delivery getting out of control



Early warning
Listen, monitor and resolve before position worsens



Positive indicator
Work to maintain, communicate and build on the good work

Stakeholders	<ul style="list-style-type: none"> No clear sponsorship or direction Too many questions on 'why are we doing this?' Stakeholders disengaging Ownership being pushed to the delivery team 	<ul style="list-style-type: none"> Increasing discussion and questions on whether delivery will achieve its goals Some stakeholders becoming 'quiet and passive' to delivery 	<ul style="list-style-type: none"> Stakeholders are all engaged Everyone is clear on the outcomes Positive ownership from stakeholders
Governance	<ul style="list-style-type: none"> Disagreements arise in steering group sessions Issues starting to appear last minute, and with no warning Decisions and agreements being 'unpicked' 	<ul style="list-style-type: none"> Increasing challenge to delivery status Too much time taken on issue resolution compared to forward plan Decisions and actions starting to mount up, remaining unresolved. 	<ul style="list-style-type: none"> Effective Governance with the right challenges to delivery Steering group engaged, in agreement on status and Making decisions promptly
Approach	<ul style="list-style-type: none"> Plan for delivery is unclear Approach and strategy is continually being revised Major disagreements on how delivery will be achieved 	<ul style="list-style-type: none"> Stakeholders starting to question if approach will deliver the outcomes Plan and approach being modified 'on the fly' Increasing activity to address 'unforeseen' risks that have been identified 	<ul style="list-style-type: none"> Everyone, is supportive of the strategy for delivery. Approach is clear on how it will deliver the outcomes Risks are understood and addressed
Progress	<ul style="list-style-type: none"> Milestones are consistently being missed Repeated replanning, cycling through red to green to red Change requests are stacking up and not being applied 	<ul style="list-style-type: none"> Milestones are starting to be missed Work is being de-scoped and pushed forwards Increasing amounts of parallel working to 'claw some time back' 	<ul style="list-style-type: none"> Everyone is confident that the checkpoints and milestones will be met Historic delivery has been to plan There is time to resolve issues
Finance	<ul style="list-style-type: none"> Costs are escalating and unexplained Additional costs to address delays Significant unexpected and unplanned costs surfacing 	<ul style="list-style-type: none"> Some additional costs to addresses specific issues Spend starting to accelerate without a clear rationale 	<ul style="list-style-type: none"> Work is being delivered within Financial expectations Spend is in line with expected progress. Little or no unplanned finance
Team	<ul style="list-style-type: none"> Open disagreements among the team Churn of staff particularly leadership Repeated request for 'more bodies' 	<ul style="list-style-type: none"> Team is becoming stretched Frustrations are surfacing and not being resolved Management decisions and ability the deliver the plan openly questioned 	<ul style="list-style-type: none"> Team is working collaboratively Positive agreement on approach plan and 'do-ability'



We hope you found this resource useful. At Partners in Change we have helped many organisations design, plan, deliver, improve and recover change and transformation activity.

Our calm, caring and collaborative team can help no matter where you are on your change journey.

If you would like to talk with us about any aspect of your change challenges, please don't hesitate to get in touch.

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PiC Change Community on LinkedIn

Our Change Community exists to help professionals like yourself connect, explore and exchange views and ideas on any aspect of change and to provide opportunities to seek and provide help to each other. If you'd like to join us, then please follow this link.

<https://www.linkedin.com/groups/12734312/>