



Change Catalyst Training

SESSION 5 MANUAL

Tracking Change: Measuring and Monitoring Change

This lesson serves as a crucial bridge between the foundational concepts covered in earlier lessons and the practical implementation strategies explored in subsequent modules.

In this lesson, participants will acquire essential knowledge and skills related to measuring and monitoring change initiatives effectively. They will learn how to establish clear success criteria, collect and analyse relevant data, and leverage insights to make data-informed decisions. This knowledge is indispensable for change leaders and practitioners seeking to maximise the impact of their change efforts and ensure organisational success during times of transformation.

By completing this lesson, participants will be well-equipped to assess the progress and effectiveness of change initiatives, optimise strategies as needed, and ultimately drive successful organisational change.

Key Concepts

- Why Change Measurement and Monitoring Matters
- What to Measure and Monitor
- How to Build and Implement a Change Measurement and Monitoring Framework
- What Happens If the Change Doesn't Go to Plan





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Change Measurement Instruments



The great management guru Peter Drucker once said, 'If you can't measure it, you can't improve it.' In change management, these words hold great meaning.

Change is the lifeblood of progress, and without a means to measure and monitor it, we're navigating in the dark.

1: Match these essential functions with why we measure and monitor in change management.

Instrument	Function in Practice	Link with Change Measurement Function
Compass	Maintained course direction by pointing north	E.g. Tracks the direction of employee sentiment
Telescope	Maintained long-term vision	
Map	Plotted known landmarks and courses	
Barometer	Used to measure atmospheric pressure	
Sextant	Determined latitude by measuring celestial angles	
Wind Vane	Wind and weather observation	
Radar	Emit radio waves to detect and analyse signals	



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Why Change Measurement and Monitoring Matters

REASONS TO MEASURE AND MONITOR CHANGE

Like navigating uncharted territory, measuring and monitoring provide clarity, helping you track progress and spot obstacles in your change journey.

Measurement keeps your change initiatives on course, aligning them with your organisation's strategic goals and ensuring everyone heads in the same direction.

Measuring change provides the data for informed decisions, akin to having sight in a chess game, giving you a strategic edge.

Measuring and monitoring help identify issues early, acting as a crystal ball to spot potential roadblocks before they derail your change efforts.

Measuring progress holds everyone accountable, similar to setting and checking off milestones on a road trip, fostering ownership in the change process.

01

Visibility in the Fog of Change



02

Alignment with Strategic Goals



03

Agile Decision Making



04

Early Detection of Issues



05

Accountability & Responsibility



Demonstrating ROI



06

Stakeholder Engagement



07

Continuous Improvement



08

Resource Allocation



09

Employee Well-Being



10

Measuring change showcases the ROI of your efforts, proving the journey's worth, much like reaching a dream destination and knowing it was worthwhile.

Measurement enhances stakeholder engagement by providing evidence of progress, answering the crucial question: "Is this change worth our investment and effort?"

Change is ongoing; data-driven insights allow continuous refinement of strategies, like real-time adjustments to your GPS route.

Measurement helps allocate resources effectively by identifying areas of progress and those needing more support, optimising time, budget, and manpower.

Monitoring employee well-being during change is vital for a positive workplace culture.

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2: Benefits of Change Measurement and Monitoring

1. What benefits can effective change measurement and monitoring bring to your projects?
2. How does having a clear understanding of your organisation's change efforts impact decision-making?
3. What if you neglect to measure and monitor change - what potential risks and pitfalls might you encounter?



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3: Change Measurement Terminology

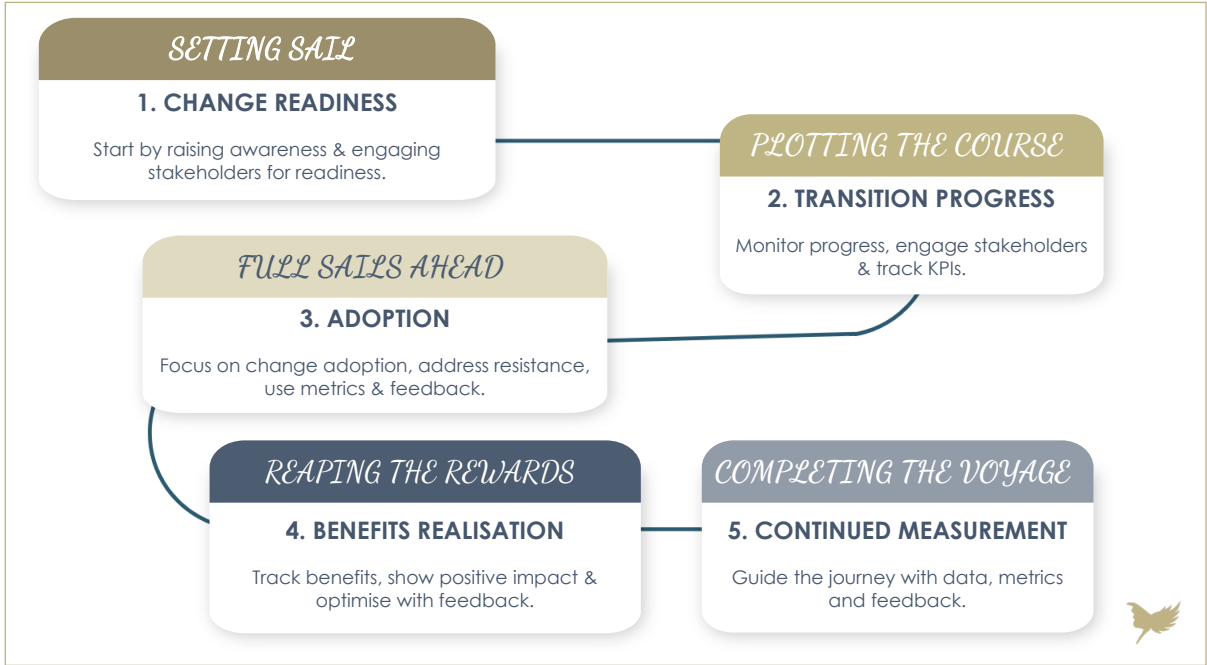
Complete the table in your manual with the following information: 1) An additional example for each concept 2) Alternative names for each concept (see options on screen).

Concept	Description	Examples	Alternative Names
Performance Result	A clear and unambiguous description of a priority for improvement.	• Increase revenue • Improve subscriber loyalty • Decrease harm caused to employees My example:	
Performance Measure	A quantification of the degree to which a Performance Result is occurring over time.	• Total Monthly Revenue • Weekly % of Subscribers Who Unsubscribe • Number of Lost Time Injuries per Month My example:	
Target	Defines the desired level of performance and often includes a time frame for achieving it.	• Increase Total Monthly Revenue to \$200,000 by June 2013 • Reduce Weekly % of Subscribers Who Unsubscribe to 0.5% by December 2012 • Reduce Number of Lost Time Injuries per Month to 3 by March 2013 My example:	
Improvement Initiative	Actions chosen to bridge the gap between current performance and the desired level. Represents strategic investments.	• Develop a new high-end product for the top 10% of customers • Align newsletter content with subscriber needs through research • Implement a Safety Culture Program to enhance employee commitment to safe working practices My example:	

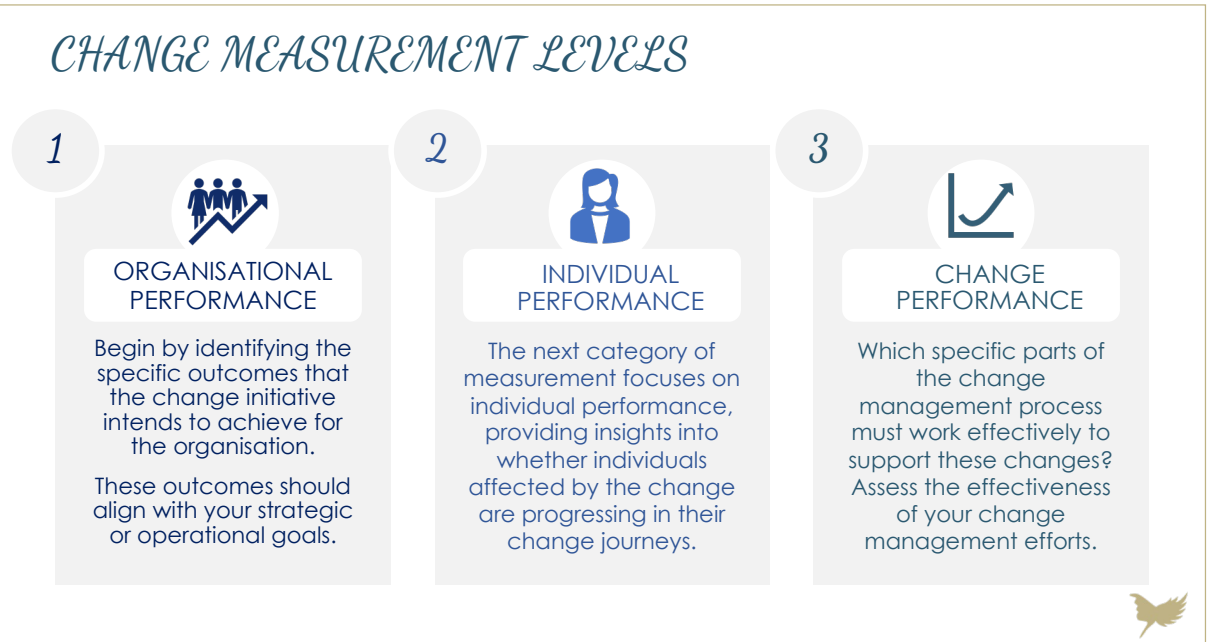


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What is the lifecycle of change management measurement?



What are the levels of measurement in change adoption?





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4: Change Management Metrics

- Why is it important to tailor your measurement approach to the specific project and its objectives?
- How can you determine which indicators are most relevant to your organisation's unique context?
- What if you focus on the wrong metrics or overlook critical aspects - how might this impact your change efforts?



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5: How do we build an effective Change Measurement Framework?

Let's dive into the practical steps for constructing this vital tool, using a fictional example of a "New Wellness Leave Policy" change initiative.

Put these steps in order.

STEP

1

Set Time-Bound Change Targets
Define time-bound targets for each metric. For "Average Sick Days Taken Per Employee," the target might be "Achieve a 15% reduction in average sick days taken per employee within six months."

STEP

2

Define Clear Change Outcomes
For each KCA, define clear and measurable change outcomes. For the "New Wellness Leave Policy," one KCA might be "Employee Well-being Enhancement".

STEP

3

Identify Key Change Areas (KCAs)
Brainstorm and identify the most critical aspects of your change initiative (e.g. New Wellness Leave Policy).

STEP

4

Select Appropriate Change Metrics (KPIs)
Identify the metrics or Key Performance Indicators (KPIs) that best represent your defined change outcomes. For "Employee Well-being Enhancement," a suitable metric could be "Average Sick Days Taken Per Employee."

STEP

5

Implement Change Measurement Plan
Put your Change Measurement Plan into action. Regularly track and measure the selected metrics, compare the results to your targets, and adjust your change initiatives as needed.

STEP

6

Plan Change Initiatives
Outline the specific change initiatives, actions, and projects that will drive the desired change in each KCA. For "Employee Well-being Enhancement," initiatives might include "Promoting Awareness of Wellness Leave" and "Providing Stress Reduction Workshops."

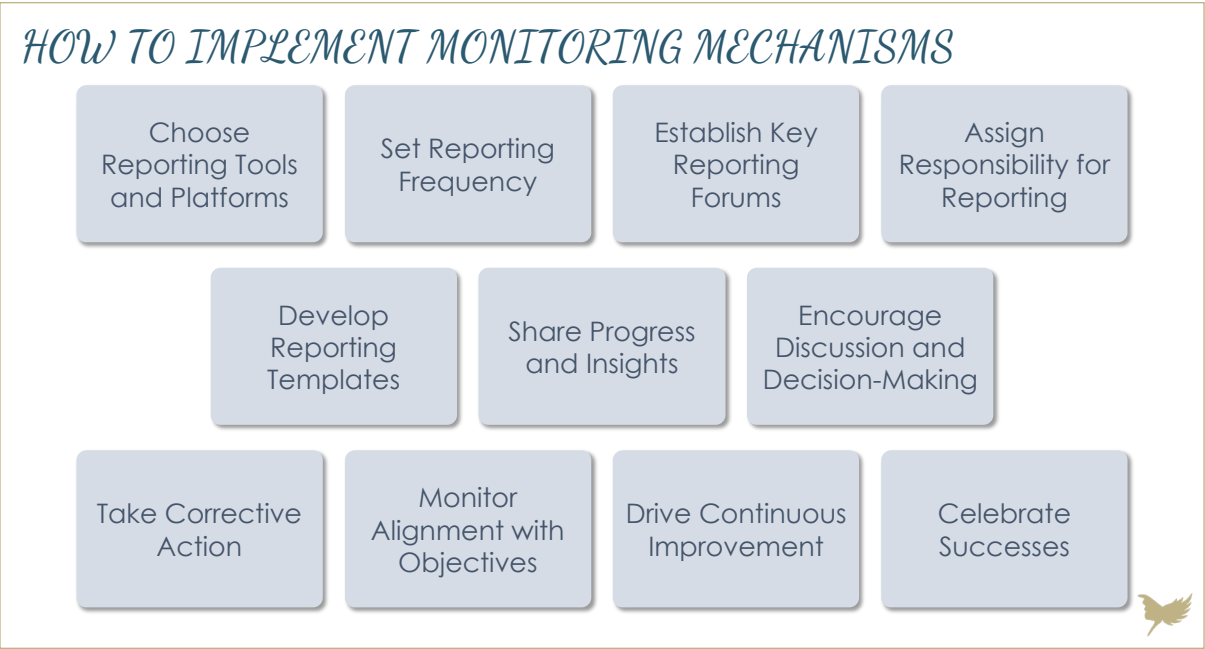
6: Implementing Monitoring Mechanisms

Which of these steps are easiest to implement in your context? Which steps will require more attention, resources and/or support? What specifically is needed?



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How do we implement monitoring mechanisms?



7: Implementing Monitoring Mechanisms

Consider which of these steps are easiest to implement in your context. Which steps will require more attention, resources and/or support? What specifically is needed?



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8: When Change Doesn't Go as Planned

Come up with 5-10 strategies that could support you when change doesn't go as planned.

1.

2.

3.

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10.

