

# Change Journey Planner

Help Others Successfully Navigate Change



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This tool works best when used in conjunction with the other tools in this series

1. Needs Analysis Tool
2. Curation Decision Tool
3. Communication Plan Launch Tool
4. Cultivating Learning in Online Communities Tool
5. Improving Impact Tool
6. Power Hour Tool
7. Improving Impact Tool
8. Team Skills Mapping Tool
9. L&D Skills Prioritiser Tool
- 10. Change Journey Planner**



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# Introduction

Technology, new methods for supporting learning, and hybrid approaches to work offer exciting new potential for L&D professionals looking to deliver business value.

Still, new approaches require change if ideas are to be accepted, adopted, and promoted by others.

For most people, change is uncomfortable because it typically involves letting go of the familiar to embrace the new. There are many reasons why so many believe that 70% of change projects fail. Often, the process of change has not been thoroughly planned out. Even when it has, change is a human process involving human emotions:

- Skepticism about a fresh approach.
- Fear of letting go of something familiar and being uncomfortable with something new.
- Frustration when we are too busy and can't see the point.
- Excitement when we finally get it.

Example source - [View Link](#)



Whilst numerous change management models have been developed to support the adoption and acceptance of new ideas, they share some common principles:

Successful change requires recognising the contributing factors.<sup>1</sup>

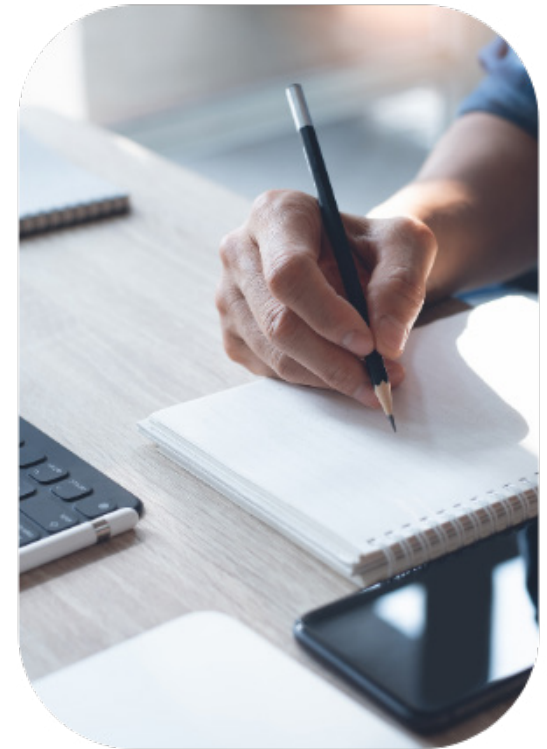
- Dissatisfaction with the status quo.
- A clear vision of the future.
- Concrete first steps.

Successful change relies on a clear process.<sup>2</sup>

- Creating a plan.
- Executing the plan.
- Embedding the change.

Successful change supports people and addresses emotions.<sup>3</sup>

- Fear.
- Uncertainty.
- Comfort and acceptance.



Successful change relies on community and needs a proactive plan – it can't be left to chance.

<sup>[1]</sup> From the Gleicher/ Danni Miller/ formula for change

<sup>[2]</sup> Examples of change management models that explore process and planning include Kotter, Lewin, the ADKAR change model, and nudge theory

<sup>[3]</sup> Examples of change management models that explore emotions include Kubler Ross change framework and the Bridges framework

## Who is this tool for?

This tool is for L&D leaders and practitioners who:

- Do not want to leave change to chance.
- Struggle to engage others with new ways of learning.
- Feel unsupported by managers who do not make time for learning.
- Are frustrated by projects that start off strong and then fizzle out.

The tool is designed to be used on a project-by-project basis to underpin lasting learning transformation. It is a simple, fillable planner to help L&D professionals identify critical elements to address in the change process.



## When to use this tool?

Examples of projects where this tool will be useful:

- ✓ Introducing the concept of self-directed learning to an organisation
- ✓ Implementing a new learning platform
- ✓ Implementing a new approach for a specific program (e.g., onboarding, management training, rolling out new technology)



# This tool will help you:

1. Clarify the change journey your organisation needs to take on and what it means for others.
2. Identify stakeholders critical to the change journey.
3. Surface risks that might increase resistance to change.
4. Map out a plan to engage stakeholders and mitigate risk.

# How to use this tool

This tool helps L&D practitioners apply effective change management processes for the best chance of L&D success in their organisations. It considers the change journey in four distinct phases, helping users think ahead:

Phase	Objective of change actions
Phase 1: Get ready	<ul style="list-style-type: none"><li>Identify the goals of your change program.</li><li>Identify stakeholders.</li><li>Pinpoint friction points and mitigate risk.</li></ul>
Phase 2: Start strong	<ul style="list-style-type: none"><li>Communicate well to raise awareness and desire.</li><li>Identify clear, concrete actions for each stakeholder.</li></ul>
Phase 3: Progress well	<ul style="list-style-type: none"><li>Agree to a process for tracking change and adapting to feedback.</li><li>Reinforce the change process by capturing success and building ability.</li></ul>
Phase 4: Maintain momentum	<ul style="list-style-type: none"><li>Help others tell their story and share responsibility.</li><li>Reflect and learn.</li></ul>


Read through this tool fully before using it for the first time. It is designed to be used in conjunction with the other tools in this series which will prepare you for planning your change journey and help you achieve your goals along the way.

This tool provides questions to explore for each phase of the process as well as a template for you to record your goals and prioritise tasks. While you may plan ahead, the tool reminds you to adapt your approach as the journey unfolds.

# My change journey at a glance

The following list of questions will guide you through the change journey. Use the steps to plan ahead, but be prepared to adapt.

Phase		Ask yourself...	
Get ready	<b>Preparation is everything!</b> Before you even start, be clear about your destination, your starting point, and who needs to come on the journey.	Where are we going?	Describe the successful change, the vision, and its benefits.
		Where are we now?	Be clear about what is currently working, what isn't, and where we can remove friction.
		Who needs to come on the change journey?	Identify your key stakeholders, their roles, and how they currently feel.
		Take action!	
Start strong	<b>First steps to success</b> We need to raise <b>awareness</b> and create <b>desire</b> , but people may feel fear, anger, or loss. Communicating clear messages and actions makes it easier for everyone to <b>know</b> how to take their first steps.	What do we want to tell people?	Why this, why now, and what's in it for me?
		Who's involved in this phase?	Know who needs to test the change, model change, and encourage change. Provide appropriate resources to help them get started.
		What concrete first steps do we want them to take?	Make it easy to take the first step.
		How are we communicating?	Be clear and consistent about who you are communicating with and how – early connection is vital.
		Take action!	


Phase		Ask yourself...	
Progress well  	<b>Iterative improvements</b>  Frustration and uncertainty can blight any journey, so it's important to keep track of progress and use feedback to adapt, <b>reinforce</b> , and support in order to build confidence and <b>ability</b> .	How are we tracking progress?	Identify your leading and lagging indicators.
		What is the process for adapting to feedback?	Capture successes and data to inform next steps.
		Who's involved in this phase?	Be clear about what's next for them, what's changed, and what's required.
		What are the concrete next steps in the plan?	Build skills and confidence. Reinforce your change journey with a new phase.
		How are we communicating?	Reiterate the why and celebrate progress.
		Take action!	
Maintain momentum	<b>Plan ahead</b>  It's never too early to plan for sustained success. Consider how you'll build on acceptance and leverage enthusiasm by celebrating actions that <b>reinforce</b> the new status quo.	How can we embed new habits?	Reinforce the change through nudges and reminders.
		How can we help others tell their story?	Recognise, capture, and share successes and iterations.
		How can others own the journey?	Encourage others to build on success.
		What can you do next to embed change?	Underpin the change through continued support and reinforcement.
		Take action!	

# Your Change Journey Planner


The blank tool with tips

# My Change Journey: **Get Ready**


My destination:	
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Tip: What will successful change look like to everyone involved? What's in it for them? Why is this a necessary change journey?

Where are we now?	
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Tip: What's already working? What might trip you up? Is there anything you can do to remove friction?

Who do we want on this journey?	
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Tip: What do you want from stakeholders? How do they feel about their current circumstances and the change proposed? What might create more urgency?

# Now what?


Take action		
Action	By whom?	By when?




Tip: What action do you need to take before you even start to increase your chances of success?

# My Change Journey: **Start Strong**


**My destination:**

**Tip:** Keep your vision and benefits in clear view to help you prioritise. 


**What do we want to tell people?**  
*Why this? Why now?*

**Tip:** Think about what's important and urgent for your audience. 


**Who needs to be involved?**

**Tip:** Who needs to test the change, model the change, and encourage change? What do they need? 

**What concrete first steps do we want people to take?**

**Tip:** What can you do to make it easier for everyone to take the first step? How can you make this simpler? 

**What are we communicating and how?**

**Tip:** Is your message consistent with your vision, clear about the first steps, and in a language that your audience will understand? 

# Now what?


Take action		
Action	By whom?	By when?





Tip: Is there anyone else who can help you here?


# My Change Journey: **Progressing Well**


My destination:	
Tracking progress	
Process for adapting to feedback	
Who is involved in this phase?	
What are the concrete next steps?	
What are we communicating <small>To who and how?</small>	


 **Tip:** Plan these steps to reinforce your change BUT be prepared to adapt along the way.

 **Tip:** What will help us understand how people feel about change and the extent to which our vision has been adopted?

 **Tip:** Think about how you can try new ideas and how you will work with others.

 **Tip:** Prepare to get others involved once the feedback is in.

 **Tip:** If you have specific plans for a second phase to reinforce new skills and behaviour, add them here, but be prepared to change!

 **Tip:** You might not know what you are going to say at the start of the program, but you will need a plan to continue to communicate.

# Now what?

Take action		
Action	By whom?	By when?



Tip: Is there anyone else who can help you here?

# My Change Journey: **Maintaining Momentum**

Change is successful when it carries on without you!

My destination:

How can I embed new habits?

How can we help others tell their story?

How can others own the journey?

What can you do next to embed change?

**Tip:** What nudges and reminders can you build in?



**Tip:** What questions can you ask to encourage reflection? How can you encourage an environment where progress is celebrated?



**Tip:** How do you harness community?



**Tip:** What is coming up next? How can you leverage this change in your next project?



# Now what?

Take action		
Action	By whom?	By when?



Tip: Don't forget to reflect on the lessons YOU have learned from this

# Your Change Journey

## Example

Encouraging self-directed learning

### Scenario

A successful, global food manufacturing organisation is looking to roll out a new global content library to its sales and manufacturing teams to support its value of “people first.”

Exit interviews highlighted that the number one reason that people are leaving is lack of development opportunities.

Current development opportunities are focused on leadership, supporting high performers, onboarding, and mandated training but were limited due to face-to-face delivery and lack of time and resources. The L&D team is introducing this new approach to put both the opportunity and ownership back in the hands of the individuals and their teams.

They have used focus groups, analysed data, and branded their new strategy “Recipe for Success” with the launch of the brand involving:

- A 30-day campaign of micro challenges to encourage participation and raise awareness.
- An easy-to-use platform to provide access to content for all.
- Tools and tips for managers.

This example change journey shows considerations and questions to ask over time to ensure that the initiative is a success.

# My Change Journey: **Get Ready**


**My destination:**

**Establishing a culture of self-directed learning that helps individuals to flourish**

We will have arrived in the change journey when individuals are setting their own goals, planning to achieve them, accessing resources to help, asking for help, and sharing learning with others.

We have an urgency to address this now because everyone needs to be ready for rapid change in our industry and it is essential to slow down current staff attrition.

**Tip:** What will successful change look like to everyone involved? What's in it for them? Why is this a necessary change journey?



**Where are we now?**


**Training – limited to a few, history of being spoon-fed**

Previous libraries had been introduced but were not used for the following reasons:

- Didn't know where to start or why it was relevant.
- Unaware of resources/difficult to find.
- Managers unsupportive.
- Lack of motivation.
- Clunky log-in.

That said, there were some areas of success. New program needs to remove friction in the above areas – simpler log-in, clear advice to managers and individuals.

**Tip:** What's already working? What might trip you up? Is there anything you can do to remove friction?



**Who do we want on this journey?**

**Individuals**

- We want them to take charge of their own learning to support their work and careers.
- We want them to set goals, find and use relevant support in the content library, practice, and share with others.
- They may feel fearful that they don't have what it takes or feel annoyed at the loss of existing learning.

**Managers**

- We want them to create time for individuals to learn and opportunities to practice.
- They may feel irritated at being asked to do even more.

**Senior leaders**

- We are looking for engagement and endorsement, but they may feel reluctant to change (the leadership programme worked fine for them!).

**Tip:** What do you want from stakeholders? How do they feel about this change? What might create more urgency?



# Now what?

Take action		
Action	By whom?	By when?
<ol style="list-style-type: none"><li>1. Establish ongoing steering board.</li><li>2. Which departments are doing this well? Are they willing to share?</li><li>3. Work with IT to explore how to integrate the new platform into existing workspaces.</li></ol>		



Tip: What action do you need to take before you even start to increase your chances of success?

# My Change Journey: **Start Strong**

<p><b>My destination:</b></p>	<p><b>Establishing a culture of self-directed learning that helps individuals to flourish</b></p>
<p><b>What do we want to tell people?</b> Why this? Why now?</p>	<p>We are introducing this to support:</p> <ul style="list-style-type: none"> <li>• Inclusion – development opportunities for all.</li> <li>• Future-ready – for change facing our company and for the opportunities in your career.</li> <li>• Messages will be shared under the “Recipe for success” campaign.</li> </ul>
<p><b>Who needs to be involved?</b></p>	<ul style="list-style-type: none"> <li>• Senior leaders – asking them to share their vision, commitment, favorite content and why.</li> <li>• Managers – encouraging team involvement, creating space to share lessons learned.</li> <li>• Individuals – creating goals and plans for the future.</li> <li>• Internal comms/marketing – to help with launch messaging.</li> </ul>
<p><b>What concrete first steps do we want people to take?</b></p>	<ul style="list-style-type: none"> <li>• Managers – encourage team involvement within the first week.</li> <li>• Individuals – sign up to the recipe for success challenge and take part in the first activity.</li> <li>• Senior leaders – demonstrate how they have completed the first recipe for success challenge.</li> </ul>
<p><b>What are we communicating and how?</b></p>	<p>Campaign name: Recipe for success</p> <ul style="list-style-type: none"> <li>• Awareness campaign including senior leader endorsement.</li> <li>• 30-day challenge to encourage early action.</li> <li>• Managers briefing and toolkit.</li> </ul>

**Tip:** Keep your vision and benefits in clear view to help you prioritise.



**Tip:** Think about what’s important and urgent for your audience, not for you.



**Tip:** Use tools like the Needs Analysis Tool to match your new programme to business priorities.



**Tip:** Target business priorities in your manager challenge.



**Tip:** Ask your early adopters to help get the word out. Check out the launch tool for details on how to build a launch campaign.



# Now what?

Take action		
Action	By whom?	By when?
<ul style="list-style-type: none"><li>• Test core messages with focus groups/steering committee.</li><li>• Agree on 30-day challenge steps.</li><li>• Finalise marketing and brand of the campaign.</li><li>• Capture and share stories from early adopters.</li></ul>		



Tip: Is there anyone else who can help you here?

# My Change Journey: **Progressing Well**

My destination:	Establishing a culture of self-directed learning that helps individuals to flourish
Tracking progress	<ul style="list-style-type: none"> <li>• Platform data on engagement and completion.</li> <li>• Social sentiment from online chat.</li> <li>• Focus groups with individuals and managers.</li> <li>• Stories and recommendations shared.</li> <li>• Marketing data on successful engagement.</li> </ul>
Process for adapting to feedback	Review initial data with steering committee after 30-day challenge to spot improvements for communication strategy, platform and technology, and skills and resources required
Who is involved in this phase?	<ul style="list-style-type: none"> <li>• Steering committee.</li> <li>• Focus groups.</li> <li>• Line managers.</li> <li>• Supporting departments – e.g., IT or communications.</li> </ul>
What are the concrete next steps?	<p>Recipe for success phase two considerations:</p> <ul style="list-style-type: none"> <li>• Reviewing onboarding and management training so that the recipe for success campaign is reinforced in existing programs.</li> <li>• Supporting team application of the program to team goals.</li> </ul>
What are we communicating?	<ul style="list-style-type: none"> <li>• Success stories – via newsletter, video, and social platforms.</li> <li>• Tools and tips for phase two.</li> <li>• Specific team guidance – how to use recipe for success in a team context.</li> </ul>

**Tip:** What will help us understand how people feel about change and the extent to which our vision has been adopted?



**Tip:** Think about how you can try new ideas and how you will work with others.



**Tip:** Don't forget to include your providers in this stage.



**Tip:** Use the Power Hour Tool to help line managers encourage application of learning.



**Tip:** You might not know what you are going to say at the start of the program, but you will need a plan to continue to communicate.



# Now what?

Take action		
Action	By whom?	By when?
<ul style="list-style-type: none"><li>• Regular review of data with steering committee</li><li>• Working with managers to identify best applications</li></ul>		





Tip: Is there anyone else who can help you here?


# My Change Journey: **Maintaining Momentum**

Change is successful when it carries on without you!

<b>My destination:</b>	Establishing a culture of self-directed learning that helps individuals to flourish
<b>How can I embed new habits?</b>	<ul style="list-style-type: none"> <li>• Establish a calendar of themes.</li> <li>• Use behavioural science ideas to reinforce new behaviours, e.g., EAST: make communication easy, attractive, social, and timely.</li> <li>• Continue to build recipe for success principles into all ongoing L&amp;D initiatives by equipping L&amp;D and HR business partners and learning architects.</li> </ul>
<b>How can we help others tell their story?</b>	<ul style="list-style-type: none"> <li>• Create spaces where individuals can share lessons learned.</li> <li>• Encourage video sharing focusing on how individuals have applied their learning.</li> <li>• Equip in-house coaches and mentors to leverage recipe for success ideas.</li> <li>• Work with talent teams to review how active users of recipe for success are progressing internally.</li> </ul>
<b>How can others own the journey?</b>	<ul style="list-style-type: none"> <li>• Make space for user-generated content.</li> <li>• Evaluate and share effective practices that are surfacing within teams.</li> <li>• Support existing communities of practice.</li> </ul>
<b>What can you do next to embed change?</b>	<ul style="list-style-type: none"> <li>• Apply lessons learned. What has worked and what can we improve?</li> <li>• Repeat the initial recipe for success 30-day challenge each year.</li> </ul>

 **Tip:** What nudges and reminders can you build in?

 **Tip:** Check out the Cultivating Learning in Workplace Communities tool.

 **Tip:** What is coming up next? How can you leverage this change in your next project?

# Now what?

Take action		
Action	By whom?	By when?
<ul style="list-style-type: none"><li>• Hold a retrospective six months from start.</li><li>• Benchmark our approach with others.</li><li>• Capture lessons learned and update change journey planner.</li></ul>		



Tip: Don't forget to reflect on the lessons YOU have learned from this process.

# The Charity Learning Consortium

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