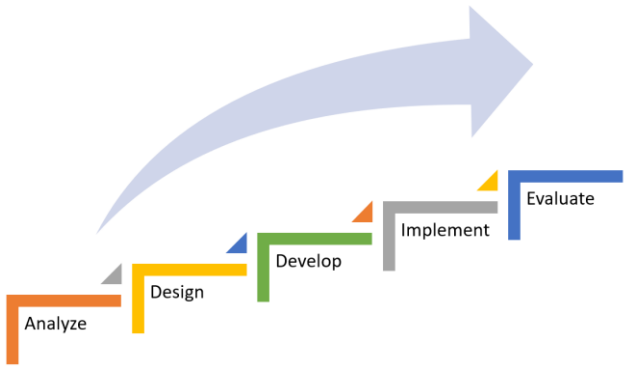
The Change Management Standard Operating Procedure (Change SOP) is designed to assist leaders when they are navigating and implementing change within their organization. The Change SOP is designed to be a guideline to help mitigate risks as a leader manages through change or a change initiative (both referred to as "change" throughout document). There is not a set blueprint or policy on how to navigate through change, but rather best practices and tools that can assist with navigating the change.

Pre and post work is required when determining the best course of action for a change initiative. A basic framework is provided: analyze, design, develop, implement, and evaluate. This framework will be detailed throughout this Change SOP.



Analyze:
Once a change initiative or an opportunity for changing current processes or programs has been presented an analysis of the current state of operations is needed. This analysis will look at the impact of people and operations and will ensure the change aligns with organizational competencies and principles. There are many ways to do an analysis of the current state, but it is important to focus on a SATA Analysis, Systems Thinking and Mental Models.

A SATA analysis will need to be created to determine all impacted employees and to determine their role within in the change:

- Sponsors – Decision makers that needs to be involved in process (GM)
- Advocates – Partners that can help influence change (fellow partners like DOF, DHR)
- Targets – Identify who the change is going to impact (how change is for)
- Agents – Change agents responsible for the actual project/initiative (you)
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Please see Change Management Training deck for instructions on conducting a SATA Analysis.

The person managing the change process is considered the Agent, to which this SOP is designed for their use.

A system's thinking approach will also need to be incorporated to determine impacts of current and future states of change. Systems thinking will provide a mechanism to determine impacts of the change onto areas outside of department and identify issues that contributed to the change opportunity/current state. A simple look back exercise can identify such influences.

Please see Change Management Training deck for information regarding Systems Thinking.

When working with distinct roles of the SATA Analysis it is important to be aware of mental models, preconceived notions, and thoughts, to determine how they might influence the change process. This is a critical process for all Targets. Understanding the mental models can be achieved through the dialogic method. The Agent should also be aware of their own mental models that might influence the change inadvertently.

Design:
After the analysis, for both the current state and desired outcome, it is time to design the change and all relevant processes. The design phase requires creativity. It is a forum to create the image of what the ideal state could be or what the end goal for the change is. During the design phase it is also appropriate to create a roadmap, identifying relevant hurdles and potential corresponding periods for each.

Consult with Targets, Advocates and Sponsors that were identified during the SATA Analysis. This will allow the Agent to gain a diversity of thought and perspectives around the change. The Design phase is more about creating possibilities rather than executing or squaring out all the details.

Please see Change Management Training deck for an example of a Journey Roadmap

Develop:
The Develop phase is where the design comes into fruition. This is the phase where prototypes, materials, processes, etc. are created, the designs from the Design phase become tangible. Develop phase is when the entire change becomes evident, including all subcomponents and subsystems. Systems thinking again can be used during the Develop phase to identify impacts outside of the direct area of change.

Ideation sessions with Targets, Advocates, and Sponsors can be critical when brainstorming possibilities for change. A mind mapping exercise can foster collaboration and a diversity of thought around the entire process.

Please see Change Management Training for Mind Mapping exercise.

Implement:
Once complete with the Develop phase it is time to start testing the materials, processes and change in general. It is best to select a test pilot group before moving forward with full implementation. This will let you test the change and identify any gaps missed during the Design or Develop phases. When selecting a test pilot group, it is beneficial to identify a group that would welcome the new change and would be open to providing feedback. The test pilot should use Targets identified during the Analyze phase.

During implementation, regular feedback sessions with Targets, Advocate and Sponsors must be conducted to ensure change is successful and meets the organizational needs.

As part of the implementation, it is imperative to determine how the pilot's success will be measured. This can be done either through quantitative or qualitative data.

The test pilot needs to be flexible as there will be changes that will arise.

Evaluate:

After the test pilot is completed and deemed to be done, it is important to evaluate the test pilot and change. It is important to conduct final feedback sessions with Targets, Advocates and Sponsors to review the pilot. It is imperative that the Change Agent is aware of their own mental models regarding the process, and welcome and invite honest feedback from the pilot.

When conducting the feedback sessions, the Agent should prepare questions in advance to prepare for what feedback is needed for the evaluation. It is also important to review any quantitative and qualitative data that is gathered to measure success of change.

At the end of the Evaluate phase it is important to determine the next step of the change: is there a need for further analysis, design, and development or can the change be implemented for a larger population? The change model is designed to be flexible and allows for movement from one phase to the next and allows for reentry of previous phases.