HR

TOOL 8.2

rbl

Pilot's Checklist

PILOT'S CHECKLIST

CHANGE PROFILE

The challenge for managing change is in sustaining the change effort through to completion. The Pilot's Checklist is a tool originating from our ground-breaking work at GE that helps increase the rigor around how organizations manage change efforts to sustain support and achieve the desired results. Rigorous adoption of the checklist and ongoing focus on managing the seven disciplines enables organizations to carry change efforts through to completion.

Pilot's Checklist Change Disciplines:

- **Leading Change**: Enrolling public and legitimate leadership inside and outside the organization to champion the transformation
- **Creating a Shared Need**: Articulating a line of sight to new business realities that require the change in order to deliver value
- **Envisioning**: Developing a clear sense of the outcomes of the transformation
- **Engaging Stakeholders**: Mobilizing commitment from key individuals who will have to implement it
- **Making Decisions**: Keeping the transformation moving forward by making the tough decisions that keep thing moving
- **Institutionalizing**: Integrating the transformation with business activities and infrastructure
- **Monitoring and Learning**: Tracking the success of the transformation

As we all know from both our personal and professional experience, initiating a change is easier than sustaining that change to a successful conclusion. The Pilot's Checklist allows you to audit your current project or transformation initiatives and determine how likely it is that you will succeed in delivering the results you set out to achieve.

Directions:

Rate how your project or transformation initiative scores on each of the Pilot's Checklist Change Disciplines in the table below. (Note: this exercise can be done individually for smaller projects or by change or executive teams for larger organizational transformations.)

Process	Rating (1-100)	Ways to Improve
Leading Change		
Creating a Shared Neeed		
Defining a Direction		
Engaging Stakeholders		
Making Decisions		
Dedicating Resources		
Learning, Adapting, and Monitoring		

Your Score

Scoring:

Any individual category that received a score of less than 80 requires attention or the outcomes of your project or initiative are in jeopardy. In the box to the right of your score (column labeled "Ways to Improve" identify 2-3 actions you can take in the next 30 days to get your initiative back on track.

A total score of less than 595 also indicates that you should identify ways to strengthen execution of your change effort. Identify the lowest-scoring discipline(s) and in the box to the right of your score (column labeled "Ways to Improve" identify 2-3 actions you can take in the next 30 days to improve your initiative's likelihood of success.

Developing change capabilities in the organization can be achieved in multiple ways:

- Skill-building training programs that target project managers
- Assigning successful change leaders as mentors to new change leaders
- Internal or external coaches for leaders charged with driving current change initiatives
- Custom-built training that helps launch or reinforce current change initiatives
- Implementing decision protocols that improve the speed and quality of overall organizational decision-making

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