

# Change Management Metrics: Measurement and Interpretation

FROM OPINION TO EVIDENCE  
FOR GREATER IMPACT



Move from opinion-based change management to evidence-informed leadership



Adoption (ultimate utilization), proficiency, speed of adoption, outcome realization



Three interdependent metric levels: change management, individual, organizational performance



Mental model: change activities → adoption signals → business outcomes and ROI



Sponsors, change leads, HR, and analysts each need different measurement views



Watch for vanity metrics, activity-only reporting, delayed data, unclear ownership

# The Evidence Base:

## Why Measurement Correlates with Change Success

MEASURE  
LEARN  
ADAPT  
CREATE IMPACT

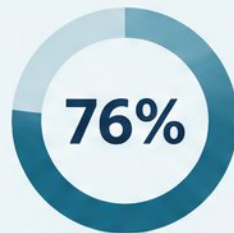
Excellent change management makes projects up to

**7x**

more likely to meet objectives



76% who measured compliance and performance met or exceeded objectives, versus 24% who did not.



Met or exceeded objectives



Did not meet objectives

Ladder of evidence



Prosci research: excellent change management makes projects up to 7x more likely to meet objectives



76% who measured compliance and performance met or exceeded objectives, versus 24% who did not



Ladder of evidence: engagement → learning → behavior → business outcomes



High adoption alone is not enough; pair it with proficiency to realize benefits



Treat links to financial results as credible correlation, not clean causation

PEOPLE  
PROGRESS  
POSSIBILITIES

# The Measurement Landscape: Five Metric Families and How to Choose Them

MEASURE  
LEARN  
ADAPT  
SUCCEED



**Five metric families:**  
change activity, adoption, proficiency, sentiment, and business outcomes



**Leading indicators**  
predict and enable course correction; lagging indicators confirm value



**Quantitative and qualitative**  
evidence together reveal different dimensions



**Balanced scorecard:**  
2-3 metrics per level, not 15 scattered across all three



**Align metric selection to**  
change strategy, scale, sponsor priorities, and non-adoption risk



## Adoption Threshold Dial



# Defining Success and Building the Measurement Plan

MEASURE  
LEARN  
DECIDE  
CREATE IMPACT



Start with the change hypothesis: what must change, and how will we know?



Define purpose, owner, cadence, source of truth, threshold, and decision trigger before collecting



Build a KPI tree: outcomes → drivers → metrics, each with baseline and target



Use existing systems (HRIS, CRM, ERP, LMS) to minimize collection burden



Governance: weekly, monthly, and quarterly reviews decide to scale, pivot, or stop



Stop tracking any metric that cannot trigger a decision

## Three-Level Metric Stack



## Metric Definition Template



Purpose



Owner



Cadence



Source of truth



Threshold



Decision trigger

# Collecting Reliable Evidence: Surveys, Operational Data, and Observation

PEOPLE  
INSIGHTS  
PROGRESS



Mix rating scales for trends with open questions for context



Avoid leading and double-barreled items; pilot before deploying



Time surveys to RAC milestones: Readiness pre-launch, Adoption at 30/60/90 days, Closure at six months



Pull adoption evidence from operational data, not self-reports



Pair surveys with observation; watch sampling, response bias, and privacy

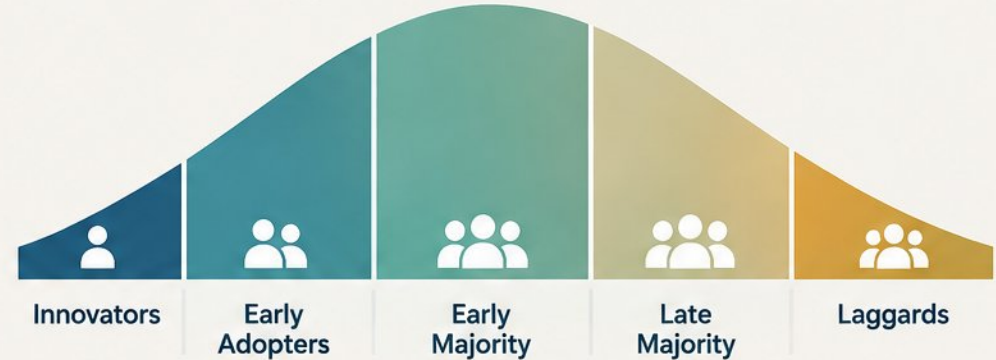
## Ladder of Evidence



# Reading Adoption and Proficiency Signals Correctly



Adoption curve segments need different support: innovators to laggards.



Proficiency means speed, accuracy, and independence — handling exceptions without escalation.



Distortions: workload, role differences, systemic saturation, dependent process issues.



Sentiment surveys can't see leadership alignment or capacity overload — pair with portfolio and audit data.



# From Metrics to Insight:

## Cohort, Segmentation, and Trend Analysis



### Segment ruthlessly:

compare functions, regions, roles, tenure, shifts, and managers



### Averages hide failure:

95% plus 15% reads as a misleading 55%



**Track trajectory over time,**  
not just the latest snapshot



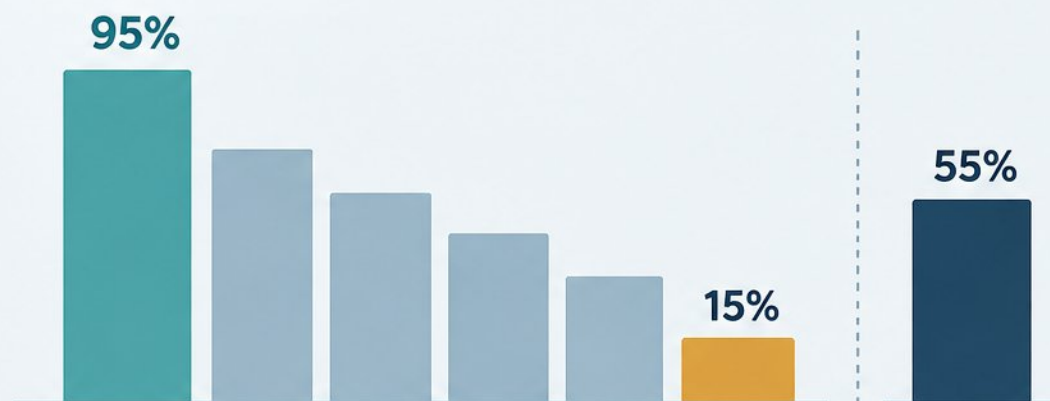
**Cohort heatmaps and time-to-adoption** expose lagging groups



### Watch bias:

correlation, survivorship, small samples, single-source data

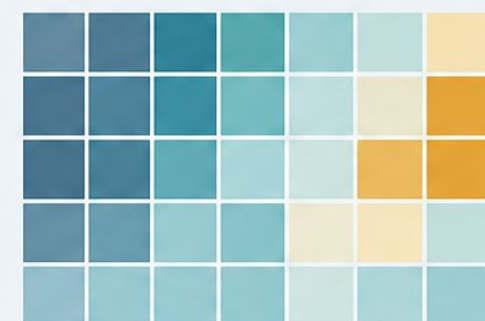
### Segmentation Reveals the Full Picture



### Trends Show Trajectory



### Cohort Heatmap



# Designing Dashboards for Decision Makers



Build separate views: sponsor, change lead, HR/L&D, and governance



Every metric needs a threshold, baseline, target, and trend



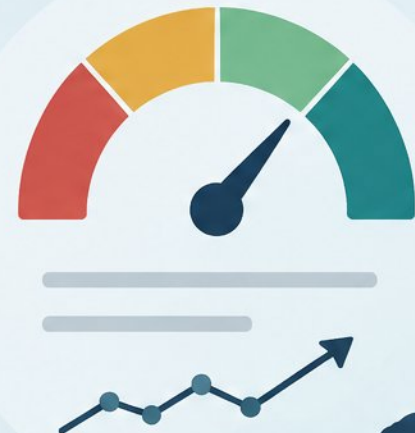
Use traffic-light colour to direct attention, not judge



Show trend lines, comparison bars, and named recommendations



Match refresh cadence to decision cadence: daily to monthly



# Reporting and Storytelling with Change Data



Context, change, cause, action:  
the narrative arc for every metric



Tailor depth per audience: board  
wants confidence, managers  
want actions



Story persuades, data convinces:  
pair evidence with short quotes  
and observations



Frame challenges as considered  
responses, never as failures



Honest "we are still investigating"  
beats a comforting but incomplete  
story



## Tailor depth per audience



**Board**  
wants  
confidence



**Executive team**



**Managers**  
want actions



# Common Traps and Failure Modes in Change Metrics

MEASURE  
WHAT MATTERS  
FOR LASTING CHANGE

1



**Vanity metrics:** completions, communications, and logins confirm activity, not behavior change

2



**Stopping measurement at go-live** misses adoption decay in the weeks after

3



**Over-reliance on surveys** can't see leadership alignment or systemic overload

4



**Goodhart's law:** when a measure becomes a target, teams optimize the metric

5



**Compliance without conviction:** 78% adoption can hide 40% performative usage

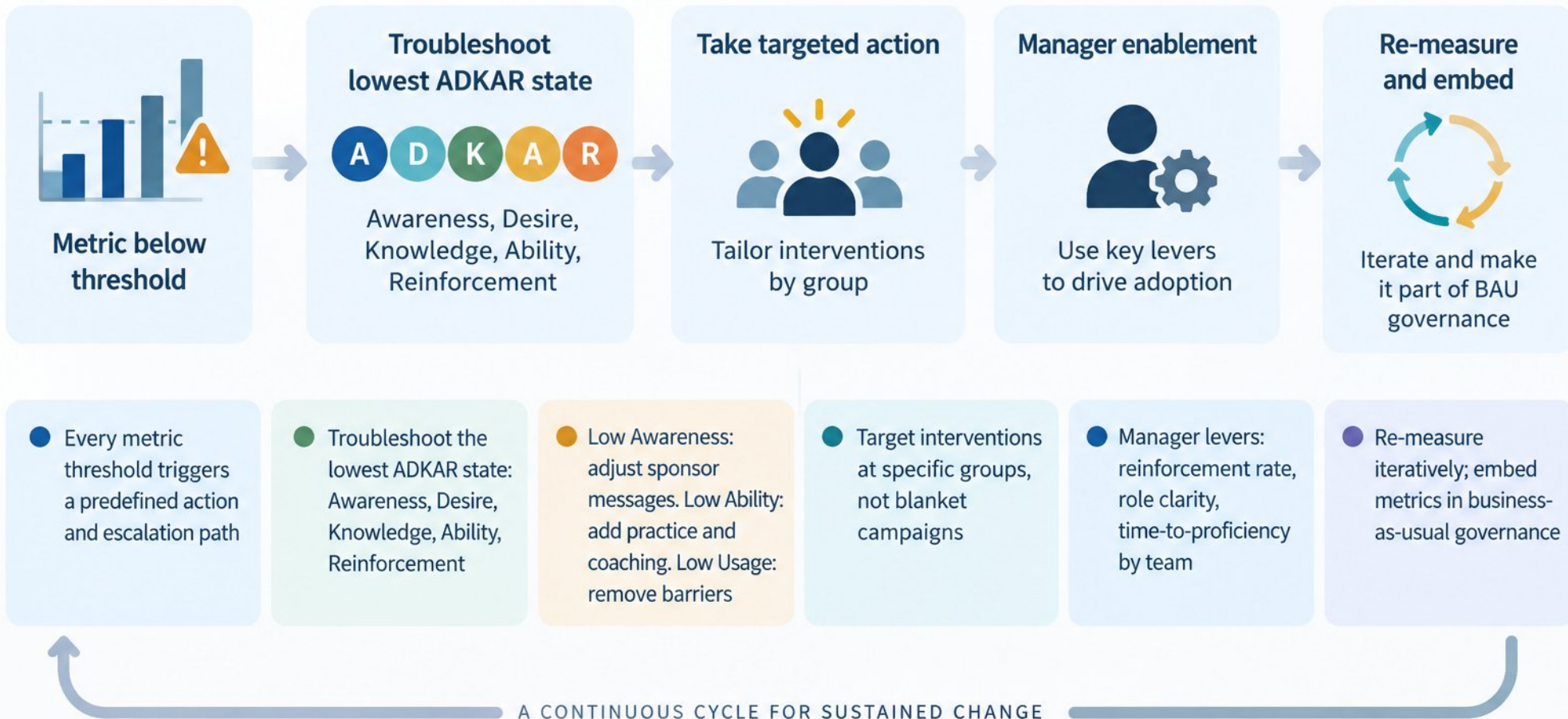
A BROADER VIEW  
FOR BETTER DECISIONS



INSIGHTS  
A MORE ADAPTABLE  
TOMORROW

# Closing the Loop: From Metric Threshold to Action

Turn insight into targeted action and lasting change.



# Sustaining Adoption: Proficiency, Reinforcement, and Regression Risk

PEOPLE  
PRACTICE  
LASTING IMPACT



Proficiency becomes meaningful 3–6 months post-go-live, beyond the learning curve



Track accuracy, cycle time, and exception handling—not just usage



Regression rate: share who adopted then reverted; a hidden cause of benefits shortfall



Ask: if support were withdrawn tomorrow, would the new way continue?



Reinforcement at 3, 6, and 12 months keeps capability and momentum alive



Embedding score: is this the standard way of working, not an overlay?

# Practical Application: Interpreting a Sample Adoption Dataset



**Mini case:** awareness high,  
proficiency low in two regions  
post-go-live



**Diagnose the bottleneck:**  
belief, skills, design friction, or  
social model



**Recommend targeted fixes:**  
manager coaching, local office  
hours, process changes



**Structure a decision update:**  
context, change, cause, action,  
owners, due dates



**Goal:** surface adoption gaps  
before they become benefit gaps



# Your Action Plan: Checklist and 30-Day Commitment



Define success, pick 2–3 metrics per level, set baselines and cadence



Design decision dashboards and build governance around measurement



Sponsors own success; change leads own the plan; HR owns listening



Analysts own data quality and dashboards; managers reinforce weekly



Choose one measurement improvement to implement in 30 days

## Three-Level Metric Stack



# PersonWise.

PersonWise • AI digital-human course platform



Scan the code or click anywhere to watch this course live, with voice Q&A

[personwise.ai/t/2673d7a3/public](https://personwise.ai/t/2673d7a3/public)