

Change Management Process: Stages, Roles, and Deliverables

- A repeatable framework for leading change from planning to execution
- A clear stage model, role clarity, and concrete deliverables
- Supports adoption, stakeholder alignment, and internal training
- Structured change management drives successful outcomes



ROLE CLARITY DRIVES SUCCESS



CHANGE LEADER



SPONSOR



COMMUNICATOR



CHANGE AGENT



DELIVERY OWNER

Why Structured Change Management Matters



- About 1 in 4 major change efforts deliver enduring value



- Failure usually stems from people issues, not strategy or technology



- Only ~41% of managers are willing to change their own behaviors without support



- A structured process with clear roles and deliverables reduces resistance and lost productivity



Core Concepts and Shared Language



- Project management delivers the solution; change management drives adoption
- Key roles: sponsor, change lead, change agent, people manager
- Terms: deliverable, milestone, adoption, readiness, transition
- Shared vocabulary prevents role confusion and clarifies handoffs

The Three-Phase Change Process at a Glance



- Prepare Approach: define success, impact, and strategy
- Manage Change: plan, track performance, and adapt actions
- Sustain Outcomes: review, reinforce, and transfer ownership
- Structured yet iterative, guided by feedback and data
- Progress is defined by outcomes, not elapsed time

Phase 1: Prepare Approach



- Define success: what we aim to achieve and how we'll measure it



- Define impact: who changes their work and how



- Define approach: steps, risks, and resistance assessment



- Secure sponsor and key stakeholder commitment early



- Primary deliverable: Change Management Strategy



Phase 2: Manage Change



- Develop Sponsor, Communications, Training, and People Manager Plans
- Monitor adoption and usage using pulse surveys and dashboards
- Adjust approach based on feedback and performance data
- Deliverable: Master Change Management Plan
- The longest, most visible phase of the process



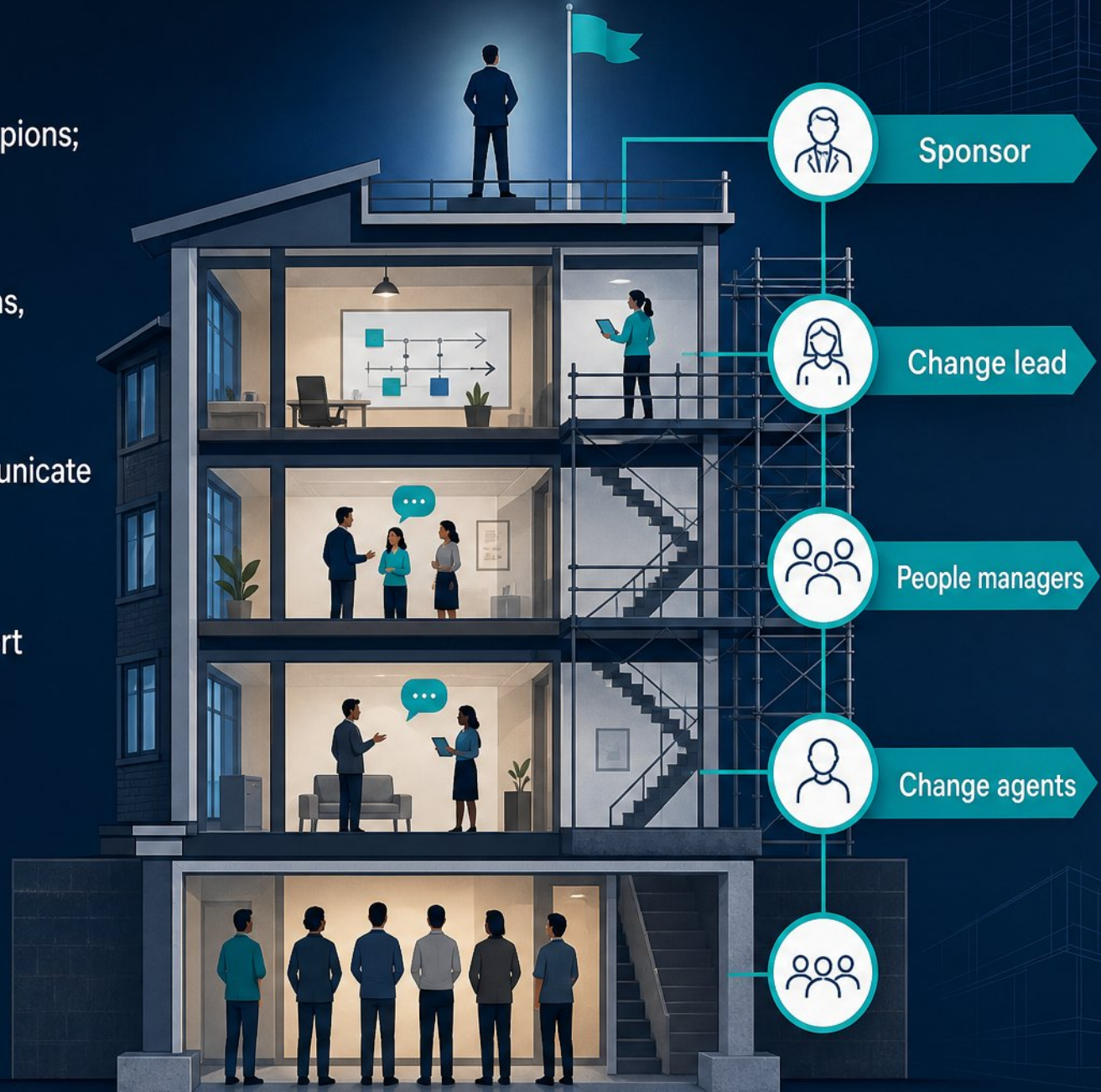
Phase 3: Sustain Outcomes

- Review performance: confirm results, document lessons learned
- Activate sustainment: close gaps, reinforce the change
- Transfer ownership to operational teams
- Celebrate successes and hand off responsibilities
- Key deliverable: Change Management Closeout



Roles and Responsibilities Across the Process

- **Sponsor:** authorizes, funds, champions; accountable for benefits
- **Change lead:** owns strategy, plans, and day-to-day coordination
- **People managers:** coach, communicate impact, manage resistance
- **Change agents:** front-line support and feedback
- Use RACI to clarify ownership and accountability



Key Deliverables by Phase

- - Prepare: change charter, stakeholder, impact & readiness assessments
- - Manage: communication, sponsor roadmap, training & resistance plans
- - Reinforce: adoption metrics, sustainability plan, closeout report
- - Every deliverable has an owner and purpose with a clear link to the next phase
- - Progress is proven by completed outputs, not activity alone



Every deliverable has an owner and purpose with a clear link to the next phase.



Deliverable Spotlight:

Assessments, Communication, and Training Plans



- Assessments: who is impacted, severity, likely resistance



- Communication plans: audience, messages, channels, senders



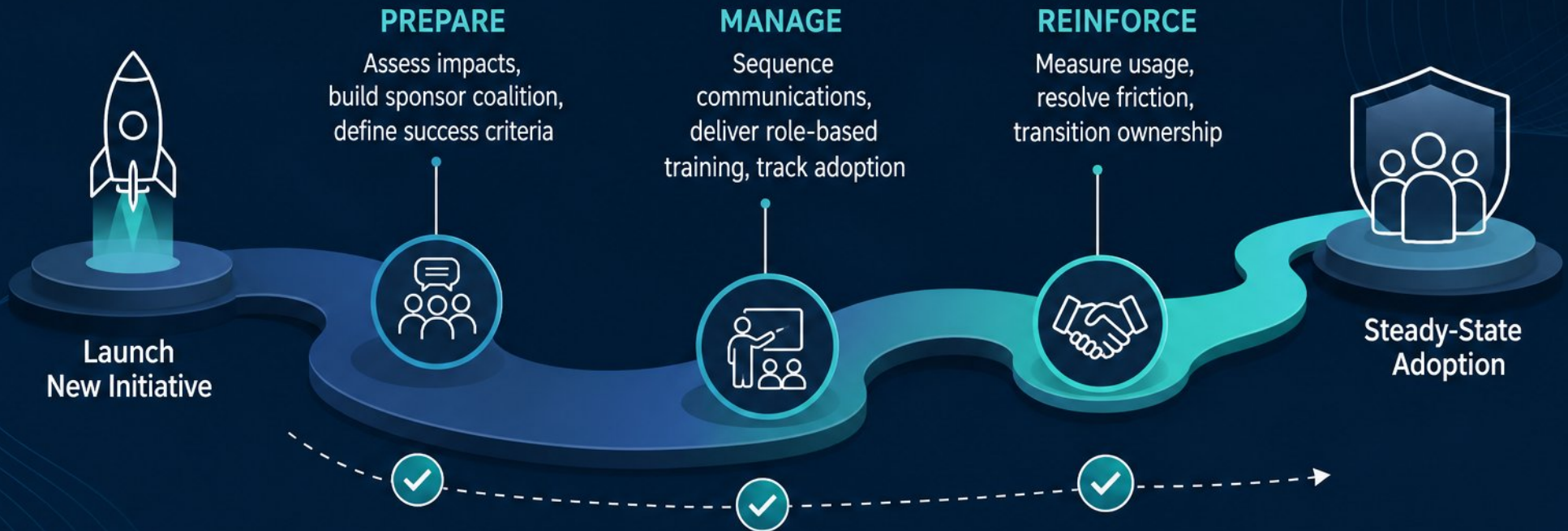
- Training plans: role-based paths, formats, schedules, proficiency checks



- Highest-leverage starting points when resources are limited



From Planning to Execution: A Practical Walkthrough



Example: new platform, tool, or workflow rollout



Prepare: assess impacts, build sponsor coalition, define success criteria



Manage: sequence communications, deliver role-based training, track adoption



Reinforce: measure usage, resolve friction, transition ownership



Checkpoints: named owners, measurable criteria, visible handoffs

Common Challenges and Manager-Level Responses



- Top challenges: resistance, weak sponsorship, change fatigue, manager overload



- Four resistance types: uncertainty, capability, trust, values



- Diagnose before responding; wrong fixes make things worse



- Respond: communicate early, involve people, train, and reinforce weekly



- Watch for silence, workarounds, missed milestones, lower participation



Turning the Model into Internal Training Content



- Build role-specific modules for sponsors, managers, and employees



- Use realistic scenarios, job aids, and talking points over theory



- Adapt language: business rationale, coaching, and personal impact



- Reinforce learning with coaching, peer discussion, and real-world application

Action Plan and Next Steps



- Apply the three-phase model to one current or upcoming change



- Run a readiness check: are sponsors, leads, managers, and owners named?



- Use a gap list to identify missing deliverables and role ambiguity



- Draft one planning-to-landing explanation and pilot it with a manager



- Continue learning through resources, templates, and peer coaching

CHANGE TO APPLY

Customer Support Operating Model

THREE-PHASE MODEL



READINESS CHECK

- ☒ Sponsors named
- ☒ Leads named
- ☒ Managers named
- ☒ Owners named

GAP LIST

- Communication plan not defined
- Training approach not confirmed
- Role clarity: decision rights unclear
- Impact assessment incomplete
- Change owner for landing not assigned

Close gaps.
Clarify roles.
Build confidence.

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