
Overview

This standard is about the planning that is needed to change processes, systems, structures, roles and culture within your work environment.

This standard is relevant to managers and leaders who plan change across the organisation or in their particular area of responsibility.

This standard links closely to all the other standards in key area *CA Facilitate innovation and change*. It also links to *CFAM&LFA5 Manage projects*.

Performance criteria

- You must be able to:*
- P1 Engage appropriate people within your organisation and other key stakeholders in planning change.
 - P2 Establish with key stakeholders the processes, systems, structures, roles or cultures that need to be changed.
 - P3 Evaluate the gap between the current state and the required future state.
 - P4 Identify and evaluate obstacles to change.
 - P5 Develop a detailed plan to achieve the required change effectively and efficiently.
 - P6 Agree with key stakeholders criteria against which to evaluate the success of the change process.
 - P7 Clearly identify the roles and responsibilities of all those involved in or affected by the change.
 - P8 Make arrangements for any necessary training and support for those involved in the change.
 - P9 Make arrangements for the continuity of business activities during the period of change.
 - P10 Evaluate the risks associated with the plan and develop contingency arrangements.
 - P11 Establish how and when progress will be monitored against the plan.
 - P12 Develop a communication strategy to keep people informed about the progress and allow them to give feedback.

Knowledge and understanding

You need to know and understand:

General knowledge and understanding

- K1 How to engage employees and stakeholders in planning change.
- K2 The main models and methods for managing change effectively, and their strengths and weaknesses.
- K3 Effective planning techniques.
- K4 Theory and understanding of teams, including an understanding of team-building techniques and how to apply them.
- K5 How to develop and gain consensus on criteria for evaluating the success of the change process.
- K6 How to assess the risks and benefits associated with strategies and plans.
- K7 The importance of contingency planning and how to do so effectively.
- K8 How to make critical decisions.
- K9 The obstacles to change, and the techniques that deal with these.
- K10 Stakeholder expectations and how they influence the process.
- K11 The principles and methods of effective communication and how to apply them.

You need to know and understand:

Industry/sector specific knowledge and understanding

- K12 Your organisation's current position in its sector and operating environment, compared with its main competitors, relevant to the change programme.
- K13 The range of information sources that are relevant to the sector, and related sectors, in which your organisation operates.
- K14 Current and emerging trends and developments in your sector.

You need to know and understand:

Context specific knowledge and understanding

- K15 Individuals within your area of work, their roles, responsibilities, competences and potential.
- K16 The vision for the future, the reasons for change, the risks and expected benefits.

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K17 Your organisation's culture.

K18 Business critical activities and interdependencies.

K19 The factors that need to be changed, and the associated priorities and reasons.

K20 Your organisation's communication channels, both formal and informal.

K21 Change management frameworks and methods used in your organisation.

Behaviours

When performing to this standard, you are likely to demonstrate the following behaviours:

- 1 Seize opportunities presented by the diversity of people
- 2 Find practical ways to overcome obstacles
- 3 Present information clearly, concisely, accurately and in ways that promote understanding
- 4 Keep people informed of plans and developments
- 5 Make time available to support others
- 6 Encourage and welcome feedback from others and use this feedback constructively
- 7 Watch out for potential risks and hazards
- 8 Agree challenging but achievable objectives
- 9 Work towards a clearly defined vision of the future
- 10 Identify the implications or consequences of a situation

Skills

When performing to this standard, you are likely to demonstrate the following skills:

- Analysing
- Communicating
- Contingency planning
- Decision-making
- Evaluating
- Influencing
- Information management
- Involving others
- Monitoring
- Negotiating
- Obtaining feedback
- Planning
- Problem solving
- Risk management
- Team building
- Thinking systematically
- Valuing and supporting others

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