

citrix | Customer Success

CUSTOMER SUCCESS MANAGEMENT

# Change Management Kit

Plan

Build

Rollout

Manage

Optimize



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PART ONE

# Why change management matters

## Why change management matters

End user readiness and adoption involves careful planning and consideration to help ensure your users are ready for whatever new technology or solution you're rolling out.

An important aspect of that end user and organizational preparation is **change management**. And we're not talking about system change management. We're talking about the **people side of change**.

Throughout this guide, you'll learn all about change management—why it should be a critical component of your readiness programs, how it helps you achieve your business goals and makes change stick, and a few basic principles to get you started.

### What is change management?

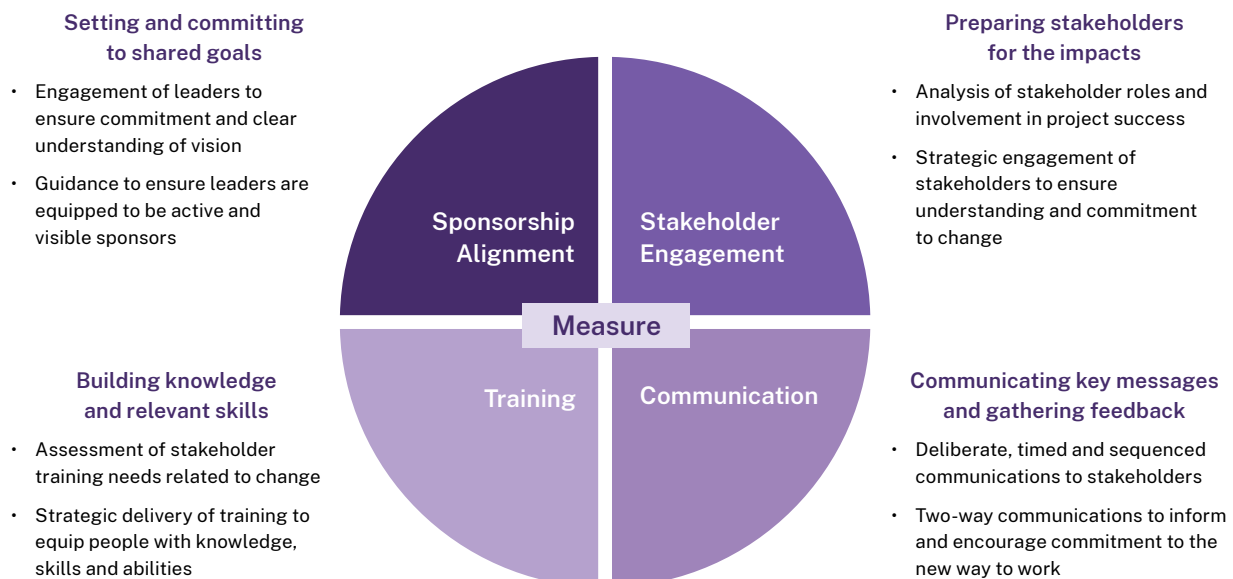
Change comes in many forms and sizes, from small procedural shifts that affect only a few employees to sweeping organizational transformations. Change situations can bring about complex reactions from impacted employees. When those reactions are not anticipated or planned for, the change can create barriers to realizing expected business benefits.

**Change management is a proactive and systematic approach to guiding the people side of change.**

An effective change program facilitates people's movement from a current state to a future state, minimizing disruption to the organization while maximizing business results. Change management consists of processes, tools, and techniques that empower employees to embrace organizational change.

Change activities can be divided into four key dimensions—**sponsorship alignment**, **stakeholder engagement**, **training**, and **communications**. Throughout all of these activities, it's important to define your success measures up front. And it's important to measure your progress before, during, and after rollout—giving you enough time to adjust as needed.

## Dimensions of a change strategy

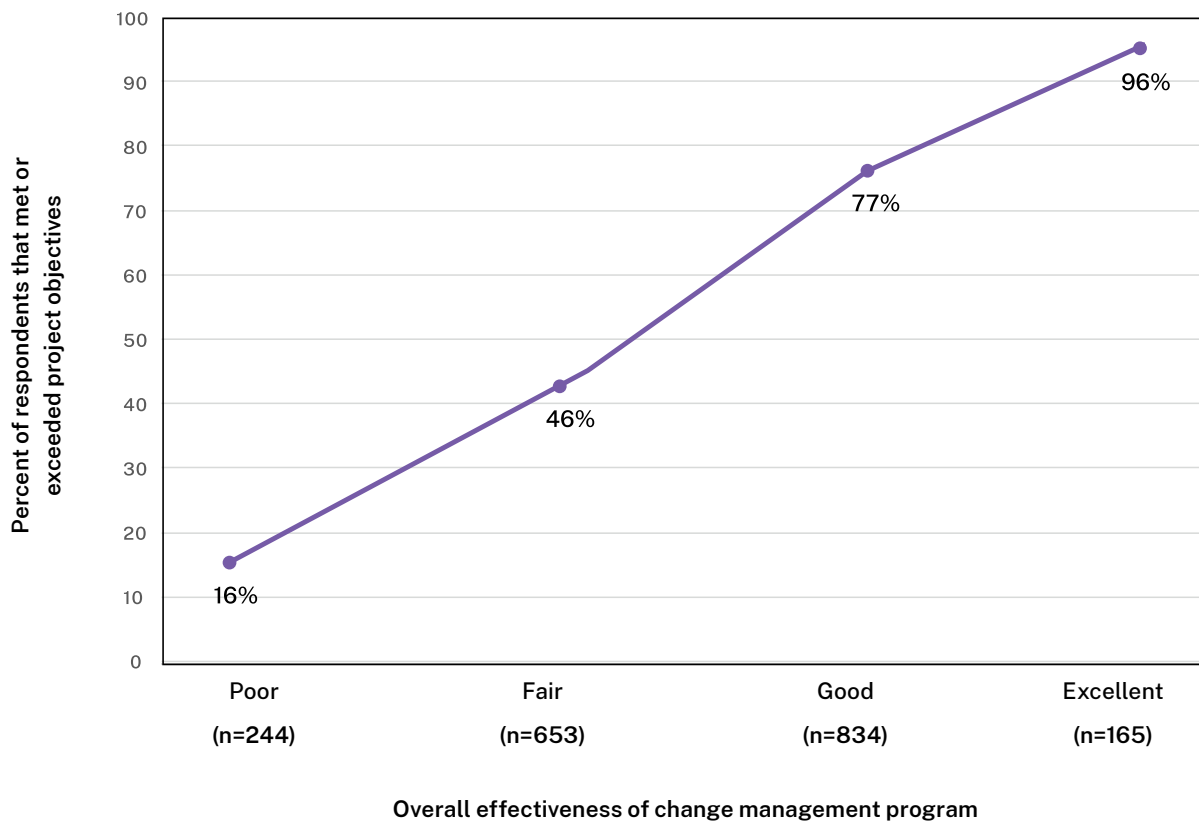


## Why is change management important?

Projects with effective change management protocols are **six times** more likely to meet or exceed objectives than projects that don't include change management principles ([Prosci Inc.](#)).

Across the board, research correlates effective change management with an increased likelihood of achieving project results. There is also a high level of correlation between change management effectiveness and project success when it comes to staying in budget and on schedule.

**Figure 3 - Correlation of change management effectiveness to meeting or exceeding objectives, Prosci Inc**



Without managing the people side of change, you won't achieve true return on investment for your new solution. Anyone can roll out a new tool. But if change management isn't part of your project plan, your employees will be less likely to alter their behavior or use the solution. And they may be dissatisfied with the experience of the change—or even their overall employee experience.

Change management done well helps employees feel aligned to the organization's vision and goals. It also helps them feel confident in their own abilities—keeping them more engaged and ultimately creating **a better employee experience**.

For more information on the value and return on investment change management can deliver, check out this [Why Change Management](#) article from Prosci, Inc.

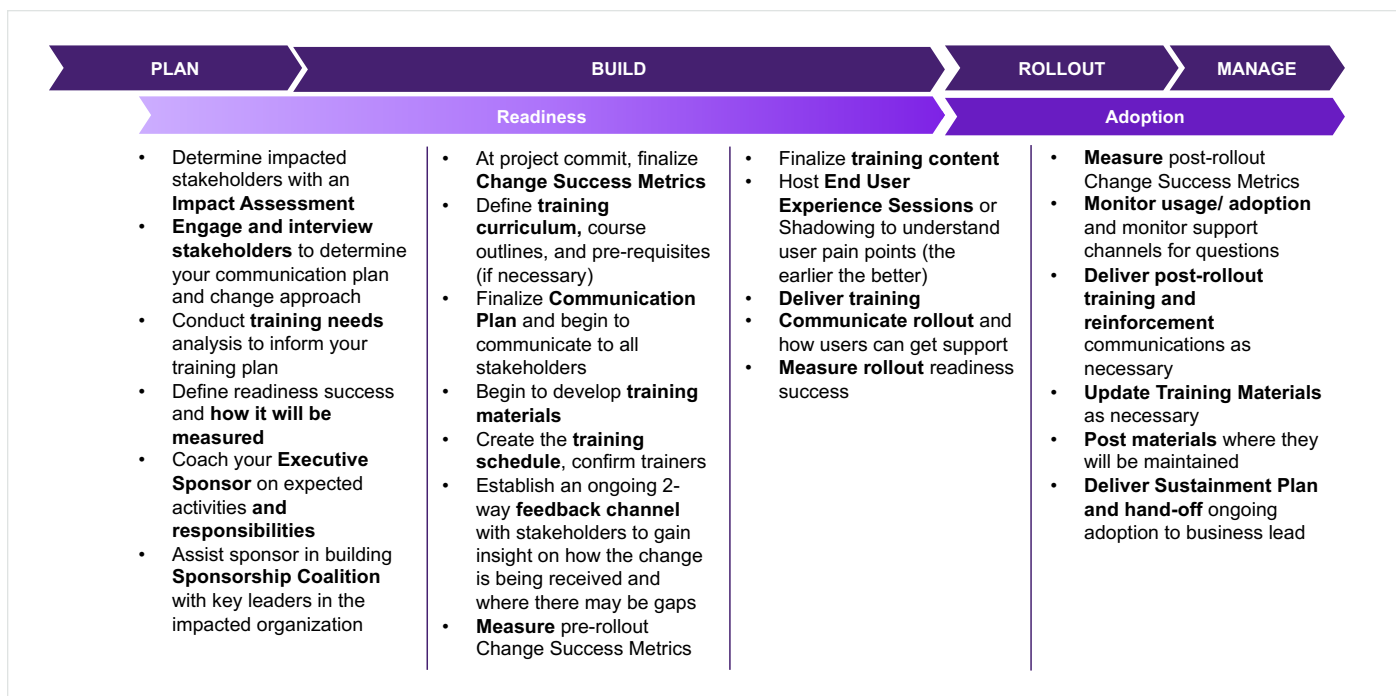
## How is change management applied to an IT project?

You should plan for change management activities throughout your project timeline. Early planning and engagement with your end users will help everyone feel better prepared for launch—and encourage your users to be more willing to change their behaviors post-rollout.

Keeping the dimensions of change in mind, here are a few key principles to consider for any project plan:

- Engage directly with stakeholders before, during, and after rollout. Take the time to **understand your stakeholders** before building a plan, gather feedback from them throughout the process, and make adjustments when needed.
- Enlist an **executive sponsor** and build a **coalition of sponsors** across the organization to help drive change from the top down. Sponsors help tie the change to the vision and strategy of the company at-large. Your sponsor should not only communicate why the change is happening, but they should also model the desired change behavior.
- Similarly, to help drive the change from the bottom up and across the organization, build a **champion group** of employees at all levels. Look for early adopters—those who can provide insightful feedback and help influence others to get on board.
- **Communicate early and often** and always **start with “why.”** Communicate often to keep stakeholders engaged and aware of what’s happening, when it’s happening, and what they need to know or do to be successful. Having a strong message around why the company is making this change and why it needs to happen now helps stakeholders get on board faster.
- Build users’ knowledge and relevant skills to ensure a smooth transition to the new way of working. Plan for **training** (tailored to each user group or role) prior to go-live to prepare them for “day 1.” Monitor proficiency and adoption post-launch and determine if more training is needed.
- Define your **success goals** from a people perspective. How do your business goals depend on people doing something differently? What will people need to change or do to be successful? Considerations can include attending training, reading communications, following the new process, using the new tool, or satisfaction with the new user experience.
- Plan for how and when you will **measure success** once you have defined what success looks like. Some examples are training attendance, proficiency in the new tool or process, and net promoter scores (NPS). Measuring throughout the project lifecycle is crucial so you can adjust your strategy based on the results.

With these key principles, a timeline for change activities would look something like this:



PART TWO

# Aligning leaders to be effective sponsors

# Aligning leaders to be effective sponsors

## The importance of aligning leadership and effective sponsorship

If you were to look for the key contributors to the success of any project, you'd find effective sponsorship at the top of the list. In fact, [Prosci's Best Practices in Change Management](#) studies continuously determine **active and visible sponsorship is the #1 indicator of successful change**.

However, just because certain members of your leadership team are involved in the project doesn't mean they'll make effective sponsors. For example, you likely have an executive leader for the change who helps drive decisions and ensures required budget and resources are available. But they may not align with other leaders on the vision and strategy (the "why"), or they may not demonstrate the desired behavior.

And it's not always only a job for a single executive sponsor. Depending on the size of the change, you may need a coalition of sponsors, made up of leaders across the impacted organization(s). This sponsorship coalition plays a central role in driving desire among their organization to make the change happen.

It's critical to ensure leaders are aligned and understand their role as sponsors of the change—from the executive sponsor to the leaders in the sponsorship coalition. If they aren't aligned on the vision, strategy, and importance of the change or don't understand what behaviors are expected from them as sponsors, you'll face challenges with adoption and lack of buy-in from users.

## What effective sponsorship looks like

True sponsorship alignment is demonstrated when leaders champion a common vision and hold their teams accountable to achieving project goals. When identifying sponsors, consider the following:

- Sponsors should **have influence** over the organization that's impacted by the change. If they don't hold the right amount of influence in an impacted group, they need to be able to mobilize other key leaders to support the change and be part of the sponsor coalition.
- Sponsors need to **remain active and visible** throughout the project. They're there for the kickoff, are engaged in pre-launch activities, and celebrate successes post-launch.
- Sponsors must **demonstrate commitment** to the change. They continuously "walk the walk and talk the talk." They not only communicate support of the change, but also demonstrate the new behavior.

## Key questions to ask during this step

- Are leaders across the impacted organizations assertively engaged in the initiative?
- Are leaders across the impacted organizations aligned on the vision for success for the initiative?
- Do leaders across the impacted organization feel a sense of urgency in moving forward with the change?
- How can we further build commitment among leaders within the impacted organizations?
- Where are there sponsorship gaps that could derail our project?



## Sponsorship from the bottom up

Now that you have a sponsorship coalition to drive the change from the top down, it's important to also drive the change from the bottom up with change champions.

**Change champions** are a vital part of the success of the initiative. They're the "boots on the ground" that help you scale your change efforts, provide valuable feedback, and build excitement for the change with their teams.

Champions are often early adopters and unafraid to give constructive feedback if something isn't working. They're also typically the go-to people on their teams for the latest news or know-how. By engaging them early and throughout the project, you'll be able to gather critical feedback and insights, such as perceptions of the initiative or how end users really get their work done.

When a change champion group is actively engaged, you'll be able to create a solution that sticks. Some examples of change champion activities to consider are:

- Kickoff session with the executive sponsor to help educate them on the initiative, their role, and the benefits of being a champion
- End user experience workshop(s)
- Pilot group(s)
- User Acceptance Testing (UAT)
- Ongoing feedback roundtables
- Key communication sharing
- Enablement to be Subject Matter Experts (SMEs) or to deliver training to their teams ("Train-the-Trainer")
- Successes or launch celebrations
- Knowledge share and/or FAQ sessions

For more information on building a change champion group, check out the [champion guide](#) on Citrix.com.

## Getting started: Enabling effective sponsors

Once you've identified the right sponsors, it's time to help them be effective at driving commitment to the change:

- Ensure all sponsors are aligned to the vision and goals of the change. It's helpful to restate the vision and goals throughout the project to keep messaging consistent.
- Engage with your sponsors to ensure they understand the importance of their roles and what's required of them. Provide them with a clear roadmap of activities and expectations, like the [sample sponsorship activity roadmap](#) at the end of this guide.
- Leverage your sponsors to deliver key communications. When it comes to building commitment to a change, employees want their leaders to communicate how the change will drive the vision and strategy—inspiring them to get on board. Include your sponsors in your communication plan to open the kickoff meeting, send important announcements, engage with your champion and UAT groups, etc.

PART THREE

# Engaging stakeholders in change

# Engaging stakeholders in change

## Stakeholder engagement: The voice of the business

Stakeholder engagement activities—including understanding the business needs of impacted stakeholders—can drive value for your overall project by amplifying the voice of your end users and providing the information needed to create an impactful change program.

Before you start creating a communication and change plan, you must first understand who your stakeholders are, their communication and enablement preferences, their concerns, their level of buy-in, and more. This guide will help you get started.

## What are stakeholders?

**Stakeholders** are teams or individuals including leadership, management, and employees who:

- May be impacted by the change (e.g. end users)
- May manage someone who is impacted by the change
- May be held accountable for program success or failure
- Have influence on the level of commitment to the change
- Have a vested interest in the outcome of the change

## Why is it important to engage stakeholders?

Engaging stakeholders early can help you create a change plan that meets their needs. Appropriately engaging stakeholders before, during, and after rollout will ensure they progress through the change process at an appropriate speed.

## What are the risks of *not* engaging stakeholders?

The risks of not effectively engaging stakeholders could include:

- Increased resistance to change, due to limited understanding of reasons for the change
- Ineffective use of resources
- Rollout of a solution that doesn't meet the needs of the users
- Low utilization and adoption of the new solution
- No or low achievement of desired business outcomes

## What are the benefits of effective stakeholder engagement?

The benefits of effectively engaging stakeholders include:

- Assurance that the right people are engaged—and that they receive the right information, at the right time, in the right way
- Proactive management of the pace and amount of change each stakeholder group must undergo to prevent “change overload”
- Organizational buy-in, commitment, and capability for change
- Mitigation of risks associated with the rollout of the change

## What should be considered during this step?

### • General stakeholder information

- Who are the major stakeholder groups impacted by the change?
- What are the roles of the stakeholder groups impacted by the change?
- How many staff members are impacted by the change within each stakeholder group?

### • Impact and influence

- What is the extent of the impact on each stakeholder group?
- How influential is the stakeholder on the success of the change initiative?
- What are the group's issues, concerns, or motivations associated with the change? You can use the [SCARF model](#) to understand why people might negatively or positively perceive the change.
- What is the level (high, medium, low) of current and desired buy-in for the change initiative?

### • Transition and support

- What does the stakeholder group need from leadership to ensure a successful transition (e.g. clarity of future, retraining, mentorship)?
- What type of training does the stakeholder group need (or prefer) to ensure a successful transition?
- For each stakeholder group, what are the most effective communication channels?

## How do I get started?

To effectively understand the needs of the business, it is best practice to first conduct a series of [stakeholder interviews](#)—not just with leaders, but people who will be directly impacted by the change. You'll find a sample interview template near the end of this kit.

1. Determine who needs to be interviewed to provide a holistic understanding of impacted stakeholders and which format will work best (e.g. small focus groups or 1:1 interviews).
2. Use the stakeholder interview sample at the end of this kit as a starting point to help you consider questions that might be relevant for your impacted stakeholder groups. The goal of these interviews is to bring the voice of the business to life, both in the design of the rollout and the accompanying change solutions.
3. Outputs from these interviews should inform a [stakeholder analysis](#), engagement strategy, and/or [stakeholder personas](#) to ensure we're taking the right steps to engage various stakeholder groups at the right time.

From your stakeholder interviews and analysis, you will be able to determine the appropriate level of engagement and influence of each stakeholder group, as well as their concerns and needs. Then you'll be ready to start building your change strategy and communication plan.

Once you've started identifying and engaging your stakeholders, ensure the voice of the business is considered throughout the project by enlisting [change champions](#) to provide feedback on project decisions, champion your change within their team, and grow adoption from the bottom up.

It's also important to consider how stakeholders can help improve the [end user experience](#) of your new solution. Gather end users' input and feedback on the changes you plan to roll out to ensure it's the right solution for them. This will make them feel part of the change and help you design a successful solution they'll want to use.

Check out the [End User Experience Kit](#) in the Success Center for more information.

PART FOUR

# Identifying change impacts

## Identifying change impacts

As you understand who your stakeholders are, you can start identifying how they may be impacted by the change. [Identifying the delta between how things are now and how they will be post-launch is an important aspect of understanding how people will experience the change—and how much change management effort is needed.](#) It's critical to identify the impact of the change before building your communication and training plans.

A [change impact](#) is the outcome of a change to the way work gets done that affects an organization or job in either a positive or a negative way. Even the smallest change can have an impact on how people work—including their responsibilities, tasks, technology, processes, and tools.

Proactive engagement with stakeholders and end users is critical to truly understanding how they will be affected by the change. Stakeholder interviews and [end user experience](#) activities are key inputs for identifying how people work today and how each user group will be impacted by the change.

Plan to create a [change impact analysis](#) early in the project. This will ensure you're able to track change impacts for each stakeholder group, the complexity of the impact, and how you will address them within your communication and/or training plans. It's okay to start with a high level of impact very early on. But for your communications and training to hit the mark and provide all of your stakeholders with the information they need for launch, an in-depth analysis is needed. This will also help you avoid last-minute additions or post-launch rework.

## Perception of the change and planning for resistance

In addition to identifying the delta between current and future state, it's also important to account for how these impacts will be perceived, and to anticipate possible challenges or resistance to the change. There are two tools you could use to identify positive and negative perceptions:

- **Fear-Pain-Gain**

An exercise to help uncover what each impacted person or role may *fear* as it relates to the change, the current pains this change could solve or future pains it could cause, and what each person or role could *gain* with this change.

- **SCARF**

A neuroscience-based model that indicates the human brain will move away from something that *threatens* status, certainty, autonomy, relatedness, and/or fairness, and will move towards something that *rewards* these areas. If a change threatens one or more dynamics of the SCARF model, consider opportunities to amplify other areas of the model. For example, if the change threatens a person's status, consider opportunities to increase or reward their certainty, autonomy, relatedness, or fairness. Find out more about the SCARF model by reading [SCARF: a brain-based model for collaborating with and influencing others](#) or watch this brief [video](#).

## Key questions to ask during this step

Change impacts and how they will be perceived can influence how much change management planning and efforts are needed. The depth and breadth of communications and training will be different for a low-impact change vs. a complex, highly disruptive change.

Leverage the questions below to document project-related changes and analyze the extent to which all stakeholder groups will be impacted.

People	Process	Technology
<ul style="list-style-type: none"> <li>• Are new capabilities or skillsets required?</li> <li>• Are there changes to ownership or workload?</li> <li>• Are there changes to culture or ways of working?</li> <li>• Are there changes in physical location (centralized or decentralized)?</li> <li>• What requires additional communication and/or training?</li> </ul>	<ul style="list-style-type: none"> <li>• Is there a change to the way the work gets done?</li> <li>• Is there a change to data sources or inputs?</li> <li>• Is there a change in reports or outputs?</li> <li>• Is there a change in communication or interaction?</li> <li>• Is there a change impacting customers, internal partners, third parties, or vendors?</li> <li>• How will the new process be perceived as threatening a domain of SCARF or creating fears or pains?</li> <li>• How will the new process be perceived as rewarding or threatening domains of SCARF?</li> <li>• How will the process solve/address fears or pains, or what will people gain?</li> </ul>	<ul style="list-style-type: none"> <li>• Are there new systems employees will be required to use?</li> <li>• Are there changes to functionality in an existing system?</li> <li>• Are there new transactions that employees are required to perform in an existing system?</li> <li>• Are there new integrations among systems?</li> <li>• How will the new systems be perceived as rewarding or threatening domains of SCARF?</li> <li>• How will the technology solve/address fears or pains, or what will people gain?</li> </ul>

## Getting started: Sample change impact analysis

This sample [change impact analysis](#) identifies common change impacts for a rollout of Workspace with Citrix Virtual Apps and Desktops. You can download it and use it as a template for your own rollout.

This exercise will help you determine how much change management will be needed. The more medium and high impacts you have, the more communications and training you should plan for. Low impacts still require change activities, but likely not as much. Each impact should be ranked according to the degree of change required:

- **Low:** Minor change that will require new behavior and may be uncomfortable in the beginning. But overall, these are relatively low-impact changes.
- **Medium:** Many of the ways in which employees do their job will change. In addition, they may have new work, requiring new skills. These changes will cause moderate disruption.
- **High:** There is a fundamental change in the way employees do their jobs. They will require significant training to perform their job in the future. These changes will cause a substantial amount of disruption.

In addition to ranking the impacts as high, medium, or low based on their complexity, be sure to consider how your employees might perceive the change using a tool like Fear-Pain-Gain or the SCARF model. If the change might be perceived negatively, ensure your messaging and change efforts include ways to address a negative perception and mitigate potential resistance.

PART FIVE

# Measuring change



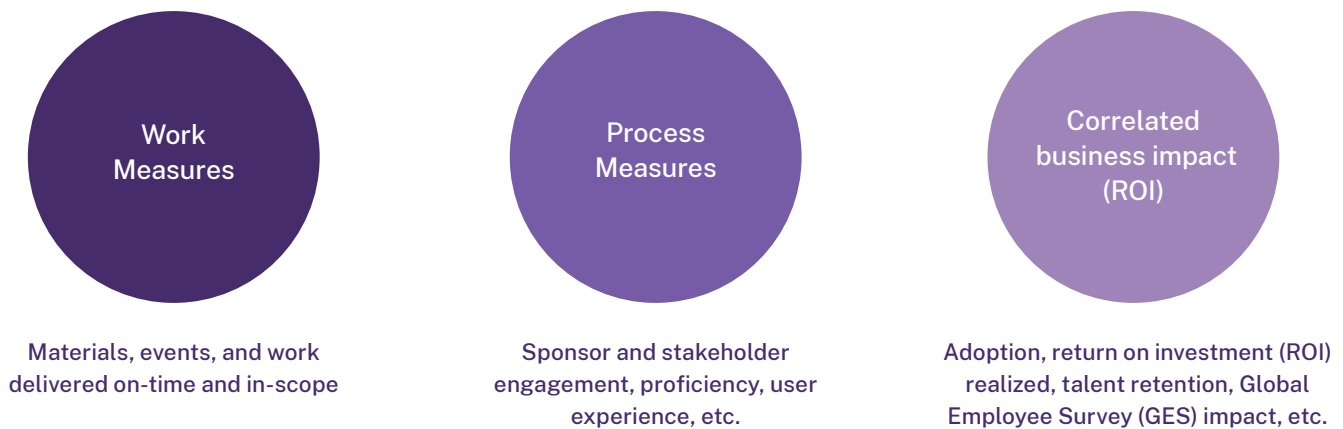
# Measuring change

## Measuring success and impact

Measuring results is a cornerstone of any well-planned change program. You can't determine if your users are ready—or if they're adopting the change—if you don't have measures in place.

Define what success looks like—and how you'll measure it—before you start rolling out the change. [Plan for measures before and after go-live so you can adjust based on the results.](#) Consider a combination of the three types of measures shown below to track and measure the progress of your change program:

### Three Dimensions for Measuring Change



Simply measuring the number of communications, training courses delivered, or support tickets opened won't show you a true representation of your employees' readiness to change—nor their overall satisfaction.

To take measurement to the next level, select measures that correlate with your overall project success, such as communication readership or measures of proficiency (i.e. your end users' ability to follow the new process efficiently). Also look at how you might correlate your work to impact—for example, link end user adoption to return on investment and value delivered to the business.

Using a mix of all three dimensions (measured throughout the program) will help you gather valuable quantitative and qualitative data and help determine if you need to pivot your efforts.

[Gathering feedback directly from your end users is crucial to success.](#) Without it, you won't have a full picture of how successful your efforts have been.

## Example change program success measures

Use this list of example change measures to help you brainstorm what to measure for your rollout. Having 2-3 readiness and adoption success measures for your project will give you a robust view of the success of your change efforts and your stakeholders' readiness.

Measurement	Uses
Training Participation Percentage	Percentage of participants who attended training, relative to the overall impacted audience
Go-Live Proficiency Rating	Impacted employee's ability to effectively work in the future state; can be assessed through quizzes and/or hands-on exercises that test ability
Training Survey Results	Indicate the effectiveness of training and could include training NPS scores or proficiency questions
Volume of Service Desk (IT) Tickets	Count of training-related tickets post-rollout, relative to anticipated volume
Communication Readership Levels	Readership metrics and content engagement measured using email tracking tools (e.g. email open rate, skim rate, and click through rate)
Adoption Percentage	Percentage of users following the new process or using the new tool; often measured through system data
Net Promoter Score (NPS)	NPS score for the change management effort as a whole, trainings, communications, or the change itself (new process/tool)
Readiness Survey	How ready end users feel for the change (new process/tool) and where they may need more help
Employee Satisfaction Survey	Employee satisfaction of change efforts (communications and trainings) and/or the new process/tool
Pulse Surveys	Employee feedback on specific topics or activities
Sponsor Involvement	Sponsorship activities may be measured through Steering Committee attendance or willingness of sponsors to relay information to their organization (e.g. sending an email drafted by the project team)
Pilot Group Adoption	Adoption of the new solution or technology by pilot and champion groups during User Acceptance Testing (UAT)

As an example, here are a couple of the measures Citrix used for our internal launch of Workspace Microapps:

- **Workspace adoption of 80%:**  
80% of employees logging into Workspace within the last 30 days
- **Feedback engagement of 20%:**  
Users providing feedback through microapp integration at least once in the last 30 days

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PART SIX

# Communicating change

## Communicating change

To ensure your stakeholders are ready for and adopt the change, you need to plan for communications throughout the project timeline.

Without deliberate, timed, and sequenced communications to stakeholders, they won't know what the change is, why it's happening, why it's important, or what it means for them. Making them less likely to adopt the solution—and making it less likely that you'll achieve your business goals.

### Key principles of communication planning

#### The objective of the communications plan is to proactively plan communications around project milestones

The communication plan should focus on activities and tactics to ensure your users know why and when the change is happening, what the change means for them, and how they are expected to make the change.

#### Tailor your messaging for each stakeholder group

Different stakeholders will likely need different information at different times. Be sure to account for each functional role or group. For example, your IT Support team will need different messaging than your end users.

#### Plan to communicate early and often

Start communicating early so your stakeholders are aware of what's coming. People need to hear a message [more than three times](#) for it to stick, before taking action. So strategically sequence your communications before, during, and after go-live to make sure your message resonates.

#### Start with “why”

The first questions employees ask when they hear about a change are “Why are we changing?” and “What are the benefits? What's in it for me?”. Be prepared to answer these questions in your first communication and reiterate the “why” in every message.

#### Leverage multiple communication vehicles

Find out what communication channels your stakeholders are already using (e.g. email, intranet, live meetings, etc.) and take advantage of those existing platforms. Keep in mind that what works for some stakeholders may not be effective for others.

#### Use the appropriate sender

Not all system-related emails should come from an IT mailbox. An executive or senior leader should be the sender of the first change announcement. They should also be the one to communicate why the change is happening—reiterating how the change supports the vision and strategy of the organization. Managers should reinforce IT's communications and explain the details of how the change will impact their employees' day-to-day work.

## How do I get started?

Once you've considered the principles listed above, start building out your communication plan. You can use the sample Citrix Workspace communication plan at the end of this guide to give you an idea of the types of communications to deliver before, during, and after launch.

PART SEVEN

# Building knowledge and skills

## Building knowledge and skills

Strategically delivering training to equip people with the necessary knowledge, skills, and abilities to work the new way is crucial to success. If people don't know how to make the change, they won't adopt it and your support team will likely be inundated with questions and tickets.

Once you've completed a [change impact analysis](#), you'll be able to identify the new knowledge or skills employees will need in the future state. Understand the delta between current and future knowledge and skills needed to build an effective enablement plan.

### Training best practices

As you build your training plan, consider these best practices:

- Engage with stakeholders, end users, and change champions early to understand their preferred vehicle for training (e.g. live instructor-led training vs. pre-recorded videos).
- Keep in mind that people learn in different ways. Even if you provide training using the preferred vehicle of the majority, it might be worth your time to provide training in other formats, too—even as a later or secondary option.
- Start by restating the vision and strategy (the “why”) to reiterate why their participation is so important.
- If multiple roles are impacted by the change, make sure the training is tailored for each group and separated by role as needed. You'll lose interest quickly if the content doesn't apply to all participants.
- If you're hosting a live session, try to have all participants either in the room or all participating virtually. Mixing in-person and virtual audiences in the same session makes it more difficult to ensure virtual attendees are getting the help or attention they need.
- Be sure your training plan is scalable, especially if enablement resources are limited. Use a [train-the-trainer](#) model or on-demand videos instead of live training if needed. You can also leverage your sponsors and change champions as trainers, or to help reinforce messaging.
- Leave plenty of time for Q&A and put a two-way communication channel in place. It takes time for people to absorb information. Keep two-way communication open with users before and after training.
- Make the training fun to keep audiences engaged. For example, add an element of competition with knowledge checks during or after training where winners receive recognition or small prizes.
- Plan post-training activities so the new knowledge and skills stick. Whether it's hands-on practice sessions or follow-up communications with tips and tricks, plan ahead for post-training reinforcement.
- Define training-related success metrics up front, and measure and act on the results. You may need to host additional training sessions, create more documentation or videos, or send more communications. Unmet success metrics could mean low adoption.

### Getting started: Citrix end user enablement resources

Check out our end user enablement resources on Citrix.com for [Citrix Workspace](#), [Citrix Virtual Apps and Desktops](#), and [Citrix Endpoint Management](#).

# Sample sponsorship activity roadmap

## Sample sponsorship activity roadmap

Effective sponsors are one of the top contributors to success for any rollout. Yet many don't know what it means to be an effective sponsor, or don't realize the responsibilities that come with the role.

A **sponsor roadmap** will help you engage leaders and tailor individual action plans outlining change management activities they need to deliver to increase alignment. This sample sponsor roadmap includes tactics you can use to help your sponsor achieve success. Use the sample below as a starting point and involve your leaders in creating their individual roadmap to generate more buy-in.

Once you have a roadmap of agreed-upon activities, align them to a timeline and establish a way to check-in on progress and to obtain and provide feedback on what is working or not.



### Show up

- Participate in key project milestones; explain why this change is important and demonstrate support
- Own the project scope; hold the team accountable for results
- Kick off special event and training sessions
- Be involved in critical decision making (at critical milestones, meetings, etc.)
- Ensure that the project has the right team members, budget, and resources for success
- Be accessible to the project team; ensure that other managers are accessible as well
- Be an early adopter; actively and visibility demonstrate your support of the future state



### Team up

- Build a coalition among leaders in impacted organizations; hold meetings to explain “what, why, and how”
- Drive priority in and across the organization
- Work directly with peers who lead the organizations impacted by the change — and their teams — to garner support, gain alignment, and address conflicting priorities or objectives



### Speak up

- Be visible to employees; effectively communicate why the change is happening, the risks of not changing, and the vision for the organization
- Set clear expectations to drive urgency and alignment around the objectives of the change
- Link key performance indicators and financial objectives for the change
- Enable two-way communications; encourage feedback and question/answer sessions
- Speak at town meetings, road shows, and key presentations
- Deliver key communications directly to impacted stakeholder groups using a multi-modal approach



# Stakeholder interview template

# Stakeholder interview template

## Objective

The primary objective of stakeholder interviews is to build awareness for your effort, and to obtain feedback and recommendations to ensure a successful implementation. We will specifically gather feedback as it pertains to:

- Change demand
- Change capacity
- Technology, business content, and work process flow implications for all groups involved
- Implementation

## Preparing for the interview

### Determine stakeholders to interview

Determine who needs to be interviewed to provide sufficient insights

### Schedule the interview

Schedule meetings or focus groups with your stakeholders to conduct the interview

### Confirm stakeholder questions

Prior to the interview, take a moment to confirm the stakeholders' "Stakeholder Group" and review the questions you will be asking—adding and removing as needed

## Interview introduction

Before starting the interview, it's important to set the stage.

1. **Introduce yourself** and explain your role in the project.
2. **Explain why** they are being interviewed and what you're hoping to accomplish. Inform them that you'll note their issues / concerns / input so you can manage them. And assure them your conversation will be kept confidential.
3. **Ask if they have any questions** about the project.
4. In a conversational way, **ask the relevant questions**.
5. **Close the interview**. Thank the interviewee and invite them to contact you if they have questions or comments later.

<b>DATE</b>	
<b>INTERVIEWER NAME</b>	
<b>INTERVIEWEE NAME</b>	
<b>TITLE</b>	
<b>ORGANIZATIONAL UNIT</b>	
<b>ROLE</b>	

Question		Response
<b>FOUNDATIONAL</b>		
<b>1</b>	<p>Do you have a good understanding of the [change/project] and its scope? (Explain if they have questions)</p> <p>What do you see as your role?</p>	
<b>2</b>	<p>How would you finish this sentence?</p> <p>[Change/project] will be a success if...</p>	
<b>3</b>	<p>How would you finish this sentence?</p> <p>[Change/project] will NOT be a success if...</p>	
<b>4</b>	<p>What do you see as the biggest benefits from the [change/project]?</p> <p>How does this project support your objectives?</p>	
<b>5</b>	<p>What do you see as the potential barriers to successful implementation?</p>	
<b>6</b>	<p>We would like to create a champion network to help champion the change, deliver key messages, and provide feedback.</p> <p>Who within your organization can fulfill this role?</p> <p>Are you willing to play this role?</p>	

**COMMUNICATIONS**

<b>7</b>	<p>We are creating a communications strategy. What is the most effective way to communicate with your group?</p>	<b>Preferred Communications Channel</b>	<b>1 = Strongly Disagree 5 = Strongly Agree</b>				
		Regional meetings	1	2	3	4	5
		Staff meetings	1	2	3	4	5
		Conference calls	1	2	3	4	5
		Email	1	2	3	4	5
		Webinar	1	2	3	4	5
		Podcast	1	2	3	4	5
		Other: _____	1	2	3	4	5
<b>8</b>	<p>Is there someone specific we should work with in your organization to share these communications, and what approval cycle would you like us to follow?</p>						
<b>9</b>	<p>What has been communicated to your organization regarding [change/project]?</p> <p>What is the best way to integrate our communications with your existing communications?</p>						

**TRAINING**

<b>10</b>	<p>We are developing a training strategy for this project. Our objective is to deliver training that gets users up-to-speed in the most expeditious manner possible.</p> <p>What are the training preferences for your group?</p>	<b>Training Preferences</b>	<b>1 = Strongly Disagree 5 = Strongly Agree</b>				
		Guides / job aids	1	2	3	4	5
		Webcasts	1	2	3	4	5
		eLearning	1	2	3	4	5
		Instructor-led	1	2	3	4	5
<b>11</b>	<p>As the project progresses, we will need additional support from those deeper in your organization for training and testing resources.</p> <p>What is the best way to identify these resources?</p>						

CHANGE				
<p><b>12</b></p> <p><i>Explain the change at a high-level if the interviewee isn't familiar with it. Review the impacts for this team, if known.</i></p> <p>The amount of overall change required for your group is [high, medium, low].</p> <p>Which roles will be the most highly impacted in your team or group?</p> <p>What impacts do you see for your team that haven't been considered yet?</p>	1 = Strongly Disagree 5 = Strongly Agree			
	1	2	3	4
<p><b>13</b></p> <p>Employees and managers will easily understand the compelling business need for [change/project].</p>	1 = Strongly Disagree 5 = Strongly Agree			
	1	2	3	4
<p><b>14</b></p> <p>Are there barriers to acceptance?</p> <p>What additional activities do you suggest to help employees embrace the change?</p>	1 = Strongly Disagree 5 = Strongly Agree			
	1	2	3	4
<p><b>15</b></p> <p>Our employees have embraced [change/project].</p>	1 = Strongly Disagree 5 = Strongly Agree			
	1	2	3	4



**Close the interview**

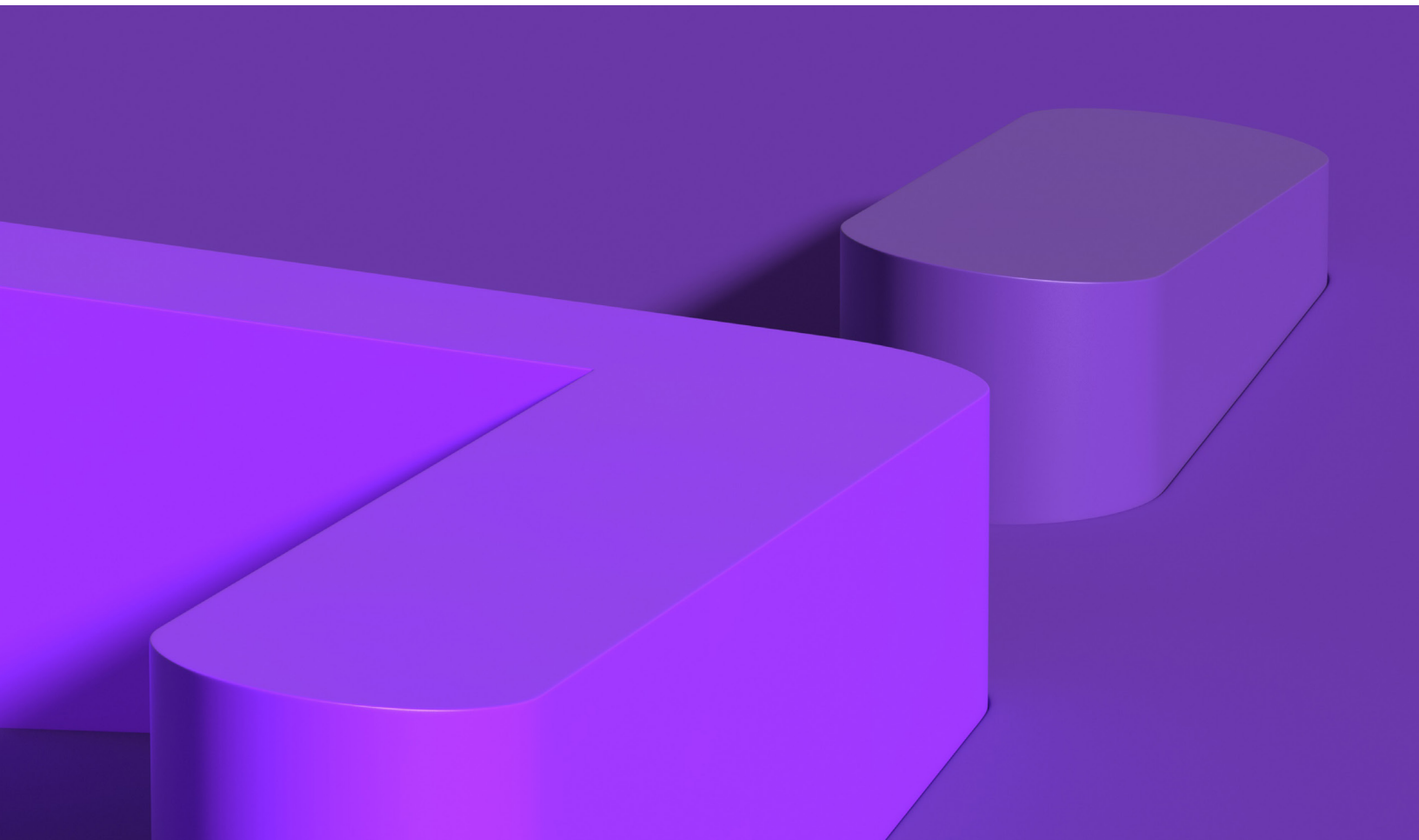
- Describe next steps in the process
- Let the interviewee know what to expect in terms of follow-up based on their contribution
- Remind them how they may be engaged in the program as it evolves
- Ask for feedback or questions
- Send a “thank you” note following the interview

# Sample change impact analysis

## Sample change impact analysis

As you learn who your stakeholders are, you must start identifying how they will be impacted by the change and their expected perception of the change. This is an important aspect of understanding how people will experience the change and how much change management effort is needed. It's critical to identify these change impacts before building your communication and training plans.

You can use this [sample change impact analysis](#) to get started. It identifies a few common change impacts for a rollout of Workspace with Citrix Virtual Apps and Desktops, and can be downloaded and used as a template for your own rollout.



# Sample Citrix Workspace communication plan



## Sample Citrix Workspace communication plan

To ensure your stakeholders are ready for and adopt the change, you need to plan early for communications throughout your project timeline. Be sure to read and think through the key principles of communication planning provided in the “[Communicating change](#)” section.

This example communication plan from a real rollout of Workspace Microapps at Citrix will give you an idea of what, when, to whom, and how to communicate throughout a project. You can even download a copy and use the format as a template to create your own communication plan for any product launch.

Access the [sample Citrix Workspace communication plan](#).



# How can Citrix help?

Head to the [Success Center](#) to access a wide array of additional resources to help get you and your end users ready for the new way to work.

And, as always, feel free to reach out to your Customer Success Manager or email [CSM@Citrix.com](mailto:CSM@Citrix.com) with any questions or guidance you need throughout your journey.



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