Guidelines - Agenda Construction and Tracking Sheet

The purpose the Agenda Construction and Tracking Sheet is to help you select the BASIC 8 elements most relevant to your change process. You can then use the sheet to plan and track progress in these key performance areas.

Simplifying the Complexity

Change is complex. This makes planning, tasking and tracking difficult. This is why the BASIC 8 process has developed the evidence based Agenda Items Menu.

The menu contains items that research and experience indicate are important for change. However, there are well over 150 of them, so knowing what is important is only one step towards simplifying the change management process.

Further to this, each change process is unique. Its variables include its context, size and time frame. It may affect systems, individuals, groups and cultural norms. As a result a change process cannot be effectively managed using a check list. It would be a serious mistake to try and use the Agenda Items Menu as a check list. It is a resource to help you identify what is important in a particular change process.

Simplifying the process requires a good situational analysis so the change management advisor can analyse which elements are important for the change process. These items can then be used as key performance indicators to plan and track the change. The Agenda Construction and Tracking Sheet provides a single spreadsheet that can be adapted by the change management advisor to suit your change process.

Importance of a Competent Change Management Advisor

Under ideal conditions, the decision as to which items to track and use as key performance indicators are made by someone with knowledge of change processes, of the research and evidence about what happens in different parts of change, and with personal experience advising or leading change processes. They are familiar with organisational dynamics and leadership dynamics, as well as communication and corporate governance. Such people are not always readily available.

The BASIC 8 Agenda Items Menu helps to offset the fact that most people are busy and skilled in other jobs and don't have the time to specialise in change. In this case, if you bring together the combination of people who have the best knowledge and skills available, the Agenda Item Menu can help them focus on the important issues.

However, if you do have access to someone who specialises in change, engage them. This is because setting the agenda is only part of the process. Understanding how to plan and act on each item is also critical. Also, other items that are not treated as key performance indicators may still be important or could become emergent issues during the change

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process. A skilled person capable of dealing with this will be a valuable resource for your change process.

The Design of the Agenda Construction and Tracking Sheet

The Agenda Construction and Tracking Sheet does more than list the Agenda Items Menu. It provides you with various columns to help with your tracking and planning.

Use as KPI	Mark whether the item is important to use as a key performance indicator for the change process.
Actions planned / undertaken	Note what actions are addressing this element of the change process.
Location / person responsible	Note the person or location (group) responsible for this area and the tasks involved. This helps for communication, cooperation and tracking progress.
Evidence of progress	List the evidence that progress is being made. A lot of actions that lead to effective change are not specific items on a project plan. Some can be spontaneous or a by product of some other action or process.
Results	Always note the results of actions. These are important for checking whether the right outcome has been achieved or whether alternative actions have to be taken. Results are also important for your communication strategy, to help people stay aware of the achievements and progress that are coming from the change process.
Critical links / overlaps with other items	Some actions are relevant for multiple menu items. The codes of related items can be included here to help keep track of related items.
Action is ongoing / finalised	Note when an action is completed. This means the change outcome has been achieved. In other words, if an action is completed but didn't achieve the desired outcome for the change process, do not mark it as completed. Rather, go back an redesign or redo the task. In the early phases it may be hard to mark off many actions as finalised because, while they commence in an early phase, they continue into later phases. It is important to remember that the menu items in each phase don't always have a finish-to-start relationship with the items in later phases. It is often a start-to-start relationship. Completed actions, especially if they relate to milestones,

are important for communication. Their importance is even higher if they relate to outcomes that start to give people an experience of the benefits of the change. These are the quick-wins that can help build morale and support for the change in the early stages.

Lessons learned The lessons learned are very important for the consolidation phase and for setting the tone in the organisation for future change processes. These lessons feed into the communication process. They can also be used to identify any ongoing need for improvement the change requires. Acknowledging and sharing them helps build organisational credibility and respect for the integrity of the organisation's leaders.

Each menu item has a unique identifier. The code at the beginning of each menu item links it to the relevant phase and layer of activity. The first letter refers to the phase and the second letter to the layer of activity. The items in each group are numbered. For example, AR02 is the second item in the risk layer of the Align phase. As a result, every item in the menu has a unique code to identify it.

Table of Codes	**Phases**				
Layers	Begin	Align	Shape	Implement	Consolidate
Planning	BP	AP	SP	IP	CP
Risk	BR	AR	SR	IR	CR
Individual Contributors	BI	AI	SI	II	CI
Managers	BM	AM	SM	IM	CM
Executives	BE	AE	SE	IE	CE
Communication	BC	AC	SC	IC	CC
Actions for Change	BA	AA	SA	IA	CA
Business Operations	BB	AB	SB	IB	CB

General Considerations

Remember that different groups move through the phases at different times and rates so planning and monitoring for when they enter each phase is important. Insert new lines if necessary for multiple tasks against a KPI or for different groups moving at different times and rates

Use the Agenda Construction and Tracking Sheet to the level that is practical and helpful to your change process. Don't overcomplicate things. The goal is to simplify. There is no point making excessively detailed notes for a simple process nor is it safe to ignore factors for a complex change. It is a matter of judgement how you select the number of items to use as key performance indicators and the level of detail to track.

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