

---

# READY LEADER OR USER CHECKLISTS

**A CHANGE READINESS TOOL FOR GUIDING LEADERS OR USERS**



# INSTRUCTIONS FOR USE

- **VALUE:** The value of these checklists is to identify and help leaders & users keep track of tasks they will need to do to be ready for a change implementation.
- **USAGE:** there are various ways to use a checklist, customize for your needs
  - Identify the leaders or the users that will need to perform readiness tasks
  - Create a checklist for each disparate group (executive, leader or end user)
  - Include mandatory and nice-to-have tasks on the list
  - If possible, include the timing of when tasks need to be completed
  - Distribute to members of groups and remind them constantly to refer to the list, where the list is housed (you may update it from time to time) and ask them how they are doing with completing the tasks



# A READY LEADER CHECKLIST

## NAME OF CHANGE INITIATIVE:















A person who is ready for change is much more likely to be successful adopting it.

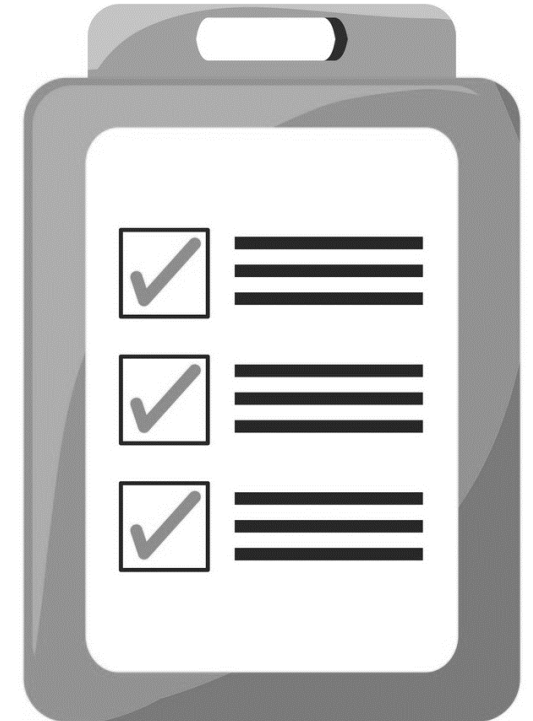
**Here's what a Ready Manager should look like. How ready are you?**

- LEAD:** Understands that the implementation is transformational; supports the effort and aligns it with the mission.
- LEARN:** Ensures team members complete training and practice in the new system. Provides extra time or support to those who are struggling.
- SUPPORT:** Creates an environment where staff feels it is safe to ask for help or identify problems.
- ACT:** Has arranged personal and professional life to accommodate go-live demands.



# SAMPLE: A READY LEADER CHECKLIST

MONTH	DATES	MILESTONE	OBJECTIVE	LOCATION IMPACTED
Ongoing	Weekly on Tuesdays	 Network Adoption Team Meeting	Weekly meeting of ABC Location operational & clinical leaders to discuss ongoing project activities	ABC DEF XYZ
March	March 9-11 (ABC ppl) March 12-13 (DEF ppl) March 17-19 (XYZ ppl) March 24-26 (ADMIN ppl)	 Employee Validation	Subject Matter Experts (SMEs) from all locations test the new system to ensure design, build, and interfaces	ABC DEF XYZ
	March 11	 Dept Readiness Meeting	Operational leaders from all networks meet to discuss key project activities	ABC DEF XYZ
	March 16	 employee Training Registration Opens	ABC Location employees can begin signing up for their required new system training courses via My Learning	ABC DEF XYZ
	March X	 Super User Training Registration Opens	Super Users can begin signing up for their required new system training courses via My Learning	ABC DEF XYZ
	Week of March 30	 Pilot Training Begins	Subject Matter Experts (SMEs) are offered a preview of end-user training; Ongoing through April 3	ABC DEF XYZ
	April	April 1	 GLRA #4 (120-Day)	Go-Live Readiness Assessment (GLRA) 120-days prior to go-live to review & determine any mitigations needed for ABC Location
April 8		 Dept Readiness Meeting	Operational leaders from all networks meet to discuss key activities in new system	ABC DEF XYZ
April 24 (Shared Services) Week of April 27 (PHSW & STJN)		 Roadshows	ABC Location employees given a first-hand demonstration of new system specific to their service lines and/or areas of work	ABC DEF XYZ
April X		 Learning Labs Open	Learning Labs become available for employees to verify workflows and gain new system experience with hands-on support	ABC DEF XYZ
May	May 4	 Technical Dress Rehearsal	Project Team verifies the connectivity and viability of all hardware, software and devices needed to support new system implementation; Ongoing through July 3	ABC DEF XYZ
	May 5	 GLRA #3 (90-Day)	Go-Live Readiness Assessment (GLRA) 90-days prior to go-live to review & determine any mitigations needed for ABC Location	ABC DEF XYZ
	May 13	 Dept Readiness Meeting	Operational leaders from all networks meet to discuss key changes and activities	ABC DEF XYZ
	May 13	 Cutover Dry Run (Read Through Only)	Cutover dry run practice to prepare for transitioning workflows, data, and users from legacy system to new system	ABC DEF XYZ



<b>Legend:</b>	 Testing	 Training	 Readiness	 Go-Live Planning & Support
----------------	---	--	---	--



# A READY USER CHECKLIST

## NAME OF CHANGE INITIATIVE:

A person who is ready for change is much more likely to be successful adopting it.

**Here's what a Ready User should look like. How ready are you?**

### **ADVOCATE:**

- Accepts the need to speak positively about the change to staff and customers.
- Agrees to use the new process and workflows.

### **LEARN:**

- Is willing to learn and aims to improve skills over time.
- Can perform at the level needed for go-live.

### **SUPPORT:**

- Has the tools necessary to do the job.
- Knows where to get help and is comfortable asking.

### **ACT:**

- Has completed required training
- Has practice using new system if needed
- Has arranged personal and professional life to accommodate go-live demands.

