

MANAGER'S CHANGE TOOLKIT

1 Prepare for Change

2 Implement Change

3 Sustain Change

This **Manager Change Toolkit** equips leaders with practical, ready-to-use tools to guide their teams through change with clarity, empathy, and confidence.

Whether you're preparing for, implementing, or sustaining a change, this toolkit helps you:

- **Plan strategically** by mapping stakeholders, clarifying decisions, and setting clear milestones.
- **Communicate consistently** with message templates and feedback channels that keep your team informed and engaged.
- **Support people through transition** with reflection prompts, coaching questions, and peer networks that foster resilience and trust.

Each resource is designed to be **simple**, **actionable**, and **adaptable**, giving managers the structure and confidence to lead change effectively while maintaining team energy, alignment, and morale.



MANAGER'S CHANGE TOOLKIT



Tools for Preparing for Change



Stakeholder Map & Influence Grid

Purpose: Identify who matters most to the success of the initiative.

How to Use:

1. List stakeholders impacted or influential.
2. Plot them on a 2x2 grid (High/Low Influence × High/Low Interest).
3. Prioritize engagement accordingly.

Table Template

Stakeholder	Role/Dept.	Influence	Interest	Engagement Strategy

Example

Stakeholder	Role/Dept.	Influence	Interest	Engagement Strategy
<i>Person</i>	<i>Title</i>	<i>Are they central to the initiative?</i>	<i>Will the change impact them directly?</i>	<i>How best to engage with them</i>
Team Lead	Operations	High	High	Biweekly meetings; co-create rollout
HR	People Ops	Low	Low	Quarterly updates only

Reflection Prompt: Who are the three stakeholders I most need to engage this week, and what is my first step?



Message Template

Purpose: Keep messaging consistent and tailored.

Framework:

- Vision (Top): Where we are going
- 3-4 Key messages (Middle): Talking points aligned to priorities.
- Proof Points:/FAQs (Bottom): Data, examples, quick answers

Example

Vision

"We're moving to Y, so our projects are clearer, faster, and easier to manage."

Key Messages

1. Reduces time spent chasing updates
2. Creates transparency; everyone sees the same info.
3. Improves accountability with clear owners and deadlines.

Proof Points/FAQs

- Pilot cut reporting time by 40%
- No jobs lost, roles refocused
- Training provided; no one left to "figure it out along."

Reflection Prompt: If someone asked me in one sentence why this change matters, what would I say?



Feedback Channels Planner

Purpose: Show you're listening, not just pushing change.

Options Checklist

☐ Pulse survey (3 Qs once a month)

☐ Temperature check in team meeting

☐ Open-door hour

☐ Anonymous feedback box

Table Template

Date	Feedback Method	Notes/Theme

Example

Date	Feedback Method	Notes/Theme
<i>When</i>	<i>What</i>	<i>Anything that will help you moving forward.</i>
Sept. 22	Team meeting check-in	Mixed energy, temp check = yellow and red
Oct. 1	Open-door hour	Heard "dashboard looks too busy"

Reflection Prompt: What feedback method can I try this month that I haven't used before?

MANAGER'S CHANGE TOOLKIT

2

Tools for Implementing Change



Change Roadmap

Purpose: Give visibility without overwhelming detail.

How to Use:

1. List milestones, owners, and due dates.
2. Track status with simple categories (Not Started / In Progress / Complete).
3. Share updates regularly



Table Template

Milestone	Owner	Due Date	Status

Example

Milestone	Owner	Due Date	Status
<i>What</i>	<i>Who</i>	<i>When</i>	<i>Not started, in progress, complete</i>
Pilot team onboarding	Ops Lead	Sept. 20	In progress
Training sessions live	HR + IT	Oct. 5	Not started
Full rollout	Managers	Oct. 15	Not started

Reflection Prompt: Which milestone should I celebrate with my team this month?



Risk & Barrier Log

Purpose: Surface resistance and obstacles early.

How to Use:

- 1. Capture barriers as they arise.
- 2. Assign owner and mitigation steps.
- 3. Review weekly; escalate patterns.



Table Template

Barrier/Risk	Impact (H/M/L)	Owner	Mitigation Step	Status

Example

Barrier/Risk	Impact	Owner	Mitigation Step	Status
<i>What is it?</i>	<i>Is it a high priority?</i>	<i>Who's in charge of it?</i>	<i>How could we fix it?</i>	<i>Not started, in progress, complete</i>
Confusion on templates	Low	IT	Create standard starter templates	Not started

Reflection Prompt: Which 1-2 risks, if ignored, could derail us?



Decision-Making Matrix

Purpose: Cut through confusion on "who decides."

How to Use:

1. Assign RACI roles (Responsible, Accountable, Consulted, Informed).
2. Share openly to reduce ambiguity

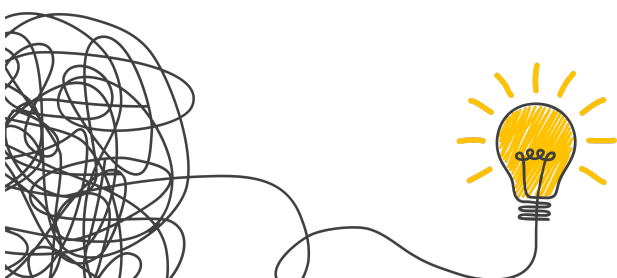
Table Template

Task/Decision	Responsible	Accountable	Consulted	Informed

Example

Task/Decision	Responsible	Accountable	Consulted	Informed
<i>What</i>	<i>General Department</i>	<i>Specific Person</i>	<i>Who do I work with on it?</i>	<i>Who needs to know?</i>
Tool configuration	IT	IT Director	Pilot Team	Managers
Rollout timing	Ops Lead	Ops Director	HR, Finance	Entire Team

Reflection Prompt: Where am I unclear about decision rights? Who do I need to clarify with?



MANAGER'S CHANGE TOOLKIT

3

Tools for Sustaining Change



Coaching Questions Deck

Purpose: Make tough conversations easier.

How to Use:

1. Use 1-2 prompts per one-on-one.
2. Listen for themes, not just answers.



“What's your biggest concern about this change?””

“What support would make this easier?””

“What's one small step you can commit to this week?””

“What part feels most hopeful to you?””

“If you could redesign one part of this change, what would it be?””

Example

Concern

“I'll lose time setting up Y.””

Support

“A cheat sheet for the first two weeks would help.””

Reflection Prompt: What am I avoiding because I fear the answer?



Energy Check-In Tracker

Purpose: Spot burnout before it spreads.

How to Use:

- 1. Ask "On a scale of 1-5, where's your energy today?"
- 2. Track averages daily.
- 3. Discuss dips openly.



Table Template

Date	Avg. Team Energy (1-5)	Notes/Comments

Example

Date	Avg. Energy	Notes/Comments
<i>When</i>	<i>Energy level</i>	<i>Anything that will help you in the future</i>
Sept. 22	4.0	Pilot group more confident
Sept. 29	2.8	End-of-quarter workload spike

Reflection Prompt: What patterns am I seeing in my team's energy?

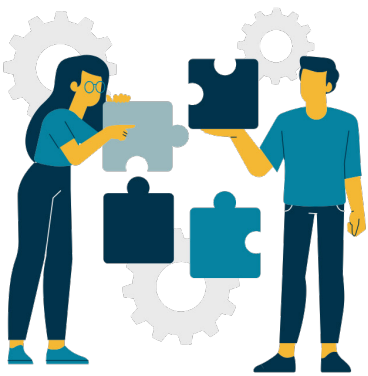


Peer Sounding Board

Purpose: Give managers safe peer support.

How to Use:

- Gather 3-5 managers.
- Meet biweekly.
- Use two standing questions:
 1. "What is one challenge I want input on?"
 2. What is one tactic I've tried that others could borrow?"



Notes Table Template

Date	Challenge Shared	Advice Received	Tactic I Want to Try

Example

Date	Challenge Shared	Advice Shared	Tactic I Want to Try
<i>When</i>	<i>What's the challenge?</i>	<i>Good advice received from peers.</i>	<i>New ideas to try with the team.</i>
Sept. 20	Low enthusiasm from Finance	Keep updates less than 5 min.; link to ROI	Draft 3-slide Finance summary
Oct. 4	Analysts resisting tool	Pair with supportive pairs	Create "change buddy" pairs

Reflection Prompt: What's one piece of advice from peers I can apply this week?



ADDITIONAL DIGITAL & PRACTICAL RESOURCES

Collaboration Hub

Purpose: Centralize communication.

How to Use:

1. Use existing platform (e.g. Teams, Slack).
2. Pin roadmap, FAQs, wins.
3. Encourage team questions and updates.

Reflection Prompt: What do I want my team to find here in 30 seconds or less?

Checklist

- ☐ Roadmap posted
- ☐ Message pinned
- ☐ FAQs accessible
- ☐ Wins celebrated
- ☐ Clear point of contact listed



Change Dashboard

Purpose: Track progress visibly.

How to Use:

- Choose 2-3 key metrics
- Use traffic light system (Green, Yellow, Red)
- Update Consistently



Table Template

Metric	Target	Current	Status

Example

Metric	Target	Current	Status
<i>What do you need to achieve?</i>	<i>Level of compliance needed</i>	<i>Level reached so far</i>	<i>Green (success), yellow (in progress, (red) not started.</i>
% Team Trained	100%	45%	Yellow
Active users in tool	80%	50%	Yellow
Issues resolved	90%	70%	Green

Reflection Prompt: Which 2-3 metrics tell me if we are truly making progress?



MANAGERS' MINI PLAYBOOKS

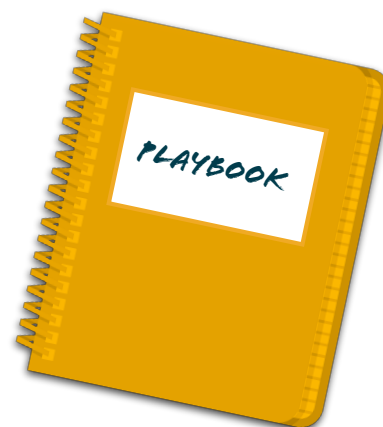
Mini-Playbooks are ready-to-use guides or "cheat sheets" to answer "What to do right now? and How to start?"

Tips for use:

- ✓ Keep these playbooks accessible (printed, pinned in Slack/Teams, or stored in a shared folder).
- ✓ Pull them up during meetings or prep time for quick confidence
- ✓ Customize lightly for your teams context, but don't over-complicate them. They are designed to be simple and actionable.

Playbook 1: 90-minute Kickoff Workshop

Purpose: Build clarity, energy, and ownership at the start of the change.



Workshop Agenda

Meeting Section	Time /Duration	Manager-Led Discussion & Activities
Icebreaker	10-15 minutes	• Quick poll: "One work on how you feel about this change." • Small group discussion: "What's one thing you hope improves through this change?"
Vision and Message	20 minutes	• Share the message house: Where we're going, why it matters, what it means for us • Give examples that tie directly to teamwork.
Q&A	30 minutes	• Collect questions anonymously (sticky notes or digital poll). • Use a "parking lot" for unresolved questions and commit to follow-up.
Next Steps	20-30 minutes	• Walk through immediate milestones from the roadmap • Identify a quick win and celebrate early. • Close with: "What's one action you'll take after today?"

► Playbook 2: Handling Resistance

Purpose: Normalize concerns, reduce friction, and keep momentum.



Do's:

- ✓ Listen fully before responding.
- ✓ Acknowledge Emotion: *"I hear this feels disruptive."*
- ✓ Ask open questions: *"What part feels hardest? What would help?"*
- ✓ Provide clarity or connect to resources.
- ✓ Pair hesitant employees with supportive peers ("change buddies").

Don'ts:

- ✗ Dismiss concerns with *"That's just how it is."*
- ✗ Argue or overload with detail.
- ✗ Assume silence = agreement.
- ✗ Take resistance personally.

Sample Phrases

“What would make this feel more manageable?”

“Let's test this on a small scale first.”

“Here's what will stay the same. Does that ease concerns?”

▶ Playbook 3: Celebrating Wins

Purpose: Keep morale up and reinforce progress throughout the change journey.



Different Ways to Shout Out Wins

Time frame	Win Call-Out Mechanism
Immediate/Informal	• Shout-outs in meetings or daily huddles. • Peer-to-peer kudos board (digital or physical). • Quick team selfie or GIF posted in the change hub when a milestone is met.
Short-Term (Weekly/Monthly)	• Handwritten thank-you notes. • Coffee or snack break sponsored by leadership. • Pass a symbolic "trophy" or token to someone who embodied the change.
Longer-Term	• Recognition in newsletters or all-hands meetings • Invited team members to share lessons learned with other groups • Rotate who presents progress updates so multiple voices are celebrated.

Reflection Prompt: Which playbook am I most likely to need this month, and how will I keep it handy?



Additional Prompts for Reflection

Reflection Prompt: If I had one tool in a tough meeting, which would I carry?

Reflection Prompt: When would visuals help me explain this change better than words?

Reflection Prompt: If I ran a team session tomorrow, what's the first exercise I'd use?