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## Overview

This unit is about the planning that is needed to make a specific change or put into practice a programme of change. It involves developing a strategy to make the change that is needed, taking note of barriers, risks and the need to put appropriate monitoring and communication systems in place.

The unit is recommended for first line managers, middle managers and senior managers.

This unit is closely linked to units:

- B6 Provide leadership in your area of responsibility.
- B7 Provide leadership for your organisation.
- B9 Develop the culture of your organisation.
- C4 Lead change.
- C6 Implement change organisation.

in the overall suite of National Occupational Standards for Management and Leadership.

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## Plan change

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### Performance criteria

*You must be able to:*

- P1 identify the procedures, systems, structures and roles that need to be changed, and assess the gap between their current and required future state
- P2 identify and assess barriers to change
- P3 develop strategies and plans that set out the way forward
- P4 assess the risks and benefits associated with the strategies and plans and develop contingency arrangements
- P5 make sure your plans include short-term 'wins' as well as longer-term deliverables
- P6 develop systems for monitoring and assessing progress
- P7 develop a communication strategy for the change process that allows people to give feedback
- P8 identify training and support needs and plan how to meet these

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### Knowledge and understanding

*You need to know and understand:*

#### **General knowledge and understanding**

- K1 the main models and methods for managing change effectively, and their strengths and weaknesses
- K2 effective planning techniques
- K3 theory and application of the change/performance curve
- K4 theory and understanding of teams, including an understanding of team-building techniques and how to apply them
- K5 how to assess the risks and benefits associated with strategies and plans
- K6 the importance of contingency planning and how to do so effectively
- K7 how to make critical decisions
- K8 the political, bureaucratic and resource barriers to change, and the techniques that deal with these
- K9 stakeholder expectations and how they influence the process

*You need to know and understand:*

#### **Industry/sector specific knowledge and understanding**

- K10 your organisation's current position in the sector and market in which it works, compared with its main competitors, relevant to the change programme
- K11 the range of information sources that are relevant to the sector, and related sectors, in which your organisation operates
- K12 current and emerging political, economic, social, technological, environmental and legal developments in the sector and in related sectors

*You need to know and understand:*

#### **Context specific knowledge and understanding**

- K13 your vision for the future, the reasons for change, the risks and expected benefits
- K14 business critical activities and interdependencies
- K15 those factors (for example, strategy, procedures, policies and structure) that need to be changed, and the associated priorities and reasons
- K16 your organisation's communication channels, both formal and informal

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### Additional Information

#### Behaviours

1. You find practical ways to overcome barriers.
2. You present information clearly, concisely, accurately and in ways that promote understanding.
3. You are vigilant for potential risks.
4. You give people opportunities to provide feedback and you respond appropriately.
5. You set demanding but achievable objectives for yourself and others.
6. You work towards a clearly defined vision of the future.
7. You identify the implications or consequences of a situation.

#### Skills

Listed below are the main generic 'skills' that need to be applied in planning change. These skills are explicit/ implicit in the detailed content of the unit and are listed here as additional information.

Communicating

Planning

Analysing

Team-building

Negotiating

Obtaining feedback

Influencing

Problem-solving

Monitoring

Risk management

Contingency-planning

Information management

Decision-making

# CFAMLC5

## Plan change

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