Change Management Checklist

The ReferenceEdge interface is evolving to a faster, cleaner, more intuitive user experience. Use this checklist, aligned to the 5 stages of the Prosci ® ADKAR model, to build your change management plan.

Stage 1 | Awareness
Understanding the need for change

Goal: Explain *why* the interface is changing.

- [ ] Share tailored email messages for each stakeholder group.
- [ ] Present in all hands and team meetings.
- [ ] Publish content via newsletters, Slack/Teams, and/or intranet.
- [ ] Share the "first look" video.

Tips for Success: Be empathetic, use the right messenger, and encourage feedback/questions early.

Stage 2 | Desire
Creating a willingness to participate

Goal: Motivate users by showing personal benefits.

- [ ] Send role-specific emails/direct messages to stakeholder groups.
- [ ] Identify and engage early adopters.
- [ ] Share the before/after interface comparison doc.

Tips for Success: Always answer *What's in it for me?* and highlight benefits.

Stage 3 | Knowledge
Providing training & information

Goal: Install confidence in using the new UI.

- [ ] Distribute Quick Reference Guides and FAQs.
- [ ] Hold live training sessions.
- [ ] Offer office hours and 1:1 availability for support.

Tips for Success: Focus on high-frequency tasks; use multiple training formats to fit different learning styles.

Stage 4 | Ability
Putting knowledge into practice

Goal: Ensure users can perform tasks in the new UI.

- [ ] Provide sandbox access (if applicable).
- [ ] Host office hours and be available for real-time support.
- [ ] Schedule 1:1 check-ins.
- [ ] Capture FAQs and update regularly.

Tips for Success: Incentivize early adopters, highlight positive user feedback in communications.

Stage 5 | Reinforcement
Sustaining the change

Goal: Make the change stick and prevent backsliding.

- [ ] Track activity vs. pre-launch benchmarks.
- [ ] Continue spotlighting the new UI in newsletters and team communications.
- [ ] Send follow-up survey 30–60 days post-launch; act on feedback.
- [ ] Update training and FAQs with real-world insights.

Tips for Success: Share "Quick Win of the Week" and invite survey respondents into focus groups for deeper insights.