

LEARN / APPLY / REFLECT

Change Management: Helping People Adopt New Ways of Working

A free introductory course for managers leading changes to processes, systems and everyday work. Learn to explain the change, support adoption and sustain progress.

Your practical learning workbook

Follow the estimated study times shown for each lesson. Course totals include the external videos, notes, activities, a 10-minute understanding check and a 20-30-minute practical assignment. Reading the optional presenter scripts may take extra time.

Use fictional or non-confidential examples. Write on a printed copy or keep your answers in your own document. Online lesson pages also let you save activity notes on your current browser.

Your name: _____

Start date: _____

By the end, you can

- Explain why a change is needed in terms people understand.
- Identify an individual barrier to adoption and choose suitable support.
- Create a simple adoption plan with observable measures.

Learning route

1. The people side of change
2. A clear reason for change
3. Participation and resistance
4. Learning the new way
5. Ability through practice
6. Sustaining the change

Complete the online understanding check and use the final assignment rubric to review practical application. This workbook is introductory learning, not a professional qualification.

LESSON 01 / PRACTICE

The people side of change

Distinguish a project milestone from successful adoption.

Start with a verb you can observe: record, approve, check or escalate. 'Be more digital' is too vague to coach. Define who performs the action, at what point in the workflow, and what a good result looks like. Separate adoption from business benefit: correct CRM use is adoption; fewer lost opportunities is a possible benefit that needs evidence over time.

Workplace example

A sales team receives a new CRM. Installation is complete, but customer follow-ups still sit in personal notebooks. The adoption goal is to record each follow-up in the shared system.

Your activity

Choose one real change. Write the old behaviour, the new behaviour and one way to observe adoption.

Self-check

The CRM is live, but staff still use private notebooks. Which measure best shows adoption?

- A. Number of software licences purchased
- B. Percentage of follow-ups recorded correctly in the CRM
- C. Date the vendor completed installation

LESSON 02 / PRACTICE

A clear reason for change

Explain the business reason and its effect on a team.

A useful change message answers three questions: why now, what changes for me, and where can I get help? Be honest about temporary inconvenience. Explain what is decided and what staff can still influence. Ask someone to explain the message back in their own words; silence at a briefing is not evidence of understanding.

Workplace example

A warehouse introduces barcode scanning. Explain that dispatch errors cause rework and delayed orders, then discuss how scanning changes picking and checking.

Your activity

Draft a three-sentence change message: the problem, the intended improvement and what the team will do differently.

Self-check

What should the first change message explain?

- A. Why the change matters and how it affects the team
- B. Every screen in the software
- C. Only the project deadline

LESSON 03 / PRACTICE

Participation and resistance

Explore concerns without assuming everyone resists for the same reason.

Treat resistance as information to investigate. Someone may lack time, permission, trust or a usable exception route. These need different responses. Ask for a recent case, observe the task and agree a small corrective experiment. Do not promise to adopt every suggestion; explain the trade-offs and report what happened to the feedback.

Workplace example

A buyer avoids a new approval workflow because urgent orders get stuck. Listening reveals an exception-handling gap rather than opposition to accountability.

Your activity

List two possible concerns about your change. Write a question that would test each assumption.

Self-check

A user says the new workflow slows urgent purchases. What is the best first response?

- A. Label the user resistant
- B. Repeat the launch announcement
- C. Ask for a recent example and investigate the obstacle

LESSON 04 / PRACTICE

Learning the new way

Design learning around the work a person must perform.

Build the practice backwards from an acceptable output. For an invoice task, specify the required customer, tax treatment, source transaction and review step. Use fictional data in a safe environment. Include an error case and ask the learner to find the approved help route. A job aid should support the task, not repeat the entire software manual.

Workplace example

For invoice clerks, training includes creating a valid invoice and correcting a rejected transaction. A one-page job aid covers the essential steps and escalation route.

Your activity

Choose one role. Define a task, a practice case and the evidence that shows the learner understands it.

Self-check

Which training design best supports invoice clerks?

- A. A tour of all software menus
- B. Practice with realistic invoices and a short task guide
- C. An email saying the system is intuitive

LESSON 05 / PRACTICE

Ability through practice

Recognise the difference between knowing and performing.

When a learner cannot complete a task, first check access, equipment and process design. More training cannot repair missing permissions. Observe without immediately taking over, identify the difficult step, demonstrate it and let the learner try again. Record the support needed so the next coaching session targets a specific obstacle.

Workplace example

A supervisor can describe a scheduling process but cannot complete it without help. A guided practice session and corrected access permissions close the gap.

Your activity

Ask a colleague to demonstrate one task in a safe environment. Record where support is needed.

Self-check

A person passed a quiz but cannot perform the task. What is needed next?

- A. Practical coaching and observation
- B. A stricter attendance policy
- C. A second copy of the launch email

LESSON 06 / PRACTICE

Sustaining the change

Plan reinforcement after the initial launch.

Reinforcement belongs to the manager who owns everyday work. Keep reviews short and focused on evidence, user feedback and unresolved friction. Avoid incentives that reward record quantity at the expense of accuracy. Stop duplicate reporting only after the new process is reliable and the relevant retention and control needs are covered.

Workplace example

A team reviews missing CRM follow-ups weekly for a month. The manager removes duplicated reporting and recognises complete records that helped resolve customer issues.

Your activity

Create a 30-day review plan with one owner, one adoption measure and a feedback route.

Self-check

What is the strongest reinforcement action?

- A. Stop support immediately after launch
- B. Measure adoption and resolve recurring barriers
- C. Send the same reminder every day

FINAL ASSIGNMENT / 20-30 MINUTES

Your 30-day adoption plan

A 20-person distributor is introducing a CRM. Staff attend training, but follow-ups still sit in notebooks. Managers ask for duplicate spreadsheets.

Prepare a one-page response addressing these five points.

1. State one observable behaviour and who must perform it.

2. Describe two barriers and how you will investigate them.

3. Specify a practice task, support owner and feedback route.

4. Choose an adoption measure, baseline and review dates.

5. Explain when duplicate reporting can safely stop.

Self-review rubric

For each point: 0 = missing; 1 = a relevant idea but vague or incomplete; 2 = a specific, feasible response linked to this scenario, with evidence or ownership where appropriate. Maximum 10. This is your self-rating, not an independent grade.

8-10: refine with your team. 5-7: strengthen weak areas. 0-4: revisit the relevant lessons. Any critical omission still needs attention regardless of the total.

WORKED RESPONSES / READ AFTER TRYING

Compare your reasoning

These are illustrative answers, not the only acceptable responses. Adapt them to your own context.

1. The people side of change

Old: follow-ups stay in personal notebooks. New: the salesperson records the next action and due date in the CRM before leaving work. Evidence: the sales manager samples ten open opportunities weekly and checks completeness, rather than merely counting logins.

Knowledge check: B. Adoption is visible in changed work practices, not only in technical delivery.

2. A clear reason for change

We lose time correcting picking mistakes. We will pilot barcode checks in one aisle to catch mismatches before dispatch. Pickers will scan the item and location, and report unreadable labels to the shift supervisor; feedback will shape the next phase.

Knowledge check: A. People need a meaningful reason and relevant context before detailed training can help.

3. Participation and resistance

Concern: emergency orders wait for an absent approver. Question: show the last urgent order and where it stopped. Response: test an authorised deputy approval route with a recorded reason. Review turnaround and exception frequency before extending it.

Knowledge check: C. A concrete example helps distinguish a process problem from a misunderstanding or skill gap.

4. Learning the new way

Role: invoice clerk. Practice: prepare an invoice from a sample approved delivery and resolve a missing customer field. Evidence: correct source reference, values and approval status, plus an explanation of what to do when information is missing.

Knowledge check: B. Task-based practice helps people connect knowledge to the work they need to do.

5. Ability through practice

Observation: the planner knows the sequence but cannot save a schedule. Diagnosis: the assigned role lacks permission. Correct access through the normal approval process, then repeat a realistic scheduling task and check that the planner completes it independently.

Knowledge check: A. Knowledge checks do not prove that someone can perform a task under real working conditions.

6. Sustaining the change

For four weeks, the sales manager samples ten opportunities each Friday. Record missing next actions, agree one improvement and review it the following week. Retire the duplicate weekly spreadsheet after the team confirms the CRM report is complete and usable.

Knowledge check: B. Sustaining change requires feedback, useful reinforcement and attention to practical obstacles.

FINAL ASSIGNMENT / WORKED EXAMPLE

Your 30-day adoption plan

Sales staff enter a next action and date for each open opportunity. The manager samples ten records before the pilot and weekly afterwards. Investigate duplicate reporting and access problems, coach staff using a realistic follow-up, and review barriers every Friday. Stop the duplicate spreadsheet only after its necessary information is reliably available in the CRM.

Your next 30 days

Choose one action, its owner, its due date and the evidence you will review.

Continue your learning

<https://sarah-ching-academy.ferching.chatgpt.site/learn/change-management.html>

Original Academy teaching notes, exercises and illustrative scenarios. External videos are credited on the online course pages. Presenter scripts are drafts; talking-presenter videos are not included in this workbook.