SmartVault

Change Management Worksheet

Use this as a template for making process changes to your business and keep checking back to make sure you're on track

Write down three bottlenecks in your business:

1. --
2. --
3. --

Write down three things you want to change:

1. --
2. --
3. --

Write down the benefits these changes will bring (internally or externally):

1. --
2. --
3. --

Change Management Checklist:

- ☐ Get buy in from other stakeholders in your business
- ☐ Explain to your staff and clients the benefits these changes will bring
- ☐ Take advantage of the technical support offered from software vendors
- ☐ Send your staff and clients links to ongoing support or training for new products

Remember: *changes will cost you time initially, but will quickly start saving you time once you have your processes in place, staff and clients onboard, and software connected.*