

Change management framework template

Use this template to plan and manage any organizational change, from implementing AskNicely's customer experience platform to broader process shifts. It's designed to help you align stakeholders, reduce resistance, and ensure long-term adoption.

Section 1: Define the change

Instructions: What's changing and why? What does success look like? Briefly describe the purpose of the change. Include what's driving it (e.g., customer experience, efficiency), and what you hope to achieve.

Field	Details
Change title	<i>E.g., "AskNicely rollout across frontline teams"</i>
Date of implementation	
Change leaders	
Summary of the change	<i>What is changing and why?</i>
Business case	<i>What problem does this solve or opportunity does it unlock?</i>

Vision for success	<i>What does success look like, and how will it be measured?</i>

Section 2: Stakeholder analysis

Instructions: Who's affected by this change, and what do they need to succeed? List key stakeholder groups, their level of impact, concerns, and what support or communication they'll need. Consider frontline teams, leaders, IT, and customers.

Stakeholder	How they're impacted	Concern/needs	Level of Impact	Recommended support
<i>E.g. Frontline staff</i>	<i>E.g. Daily users of new system</i>	<i>E.g. Clarity, support, reassurance</i>	<i>E.g. High</i>	<i>E.g. Hands-on training, positive examples</i>

Section 3: Communication plan

Instructions: How and when will you keep people informed? Outline key messages, audiences, communication channels (e.g., email, Slack, meetings), frequency, and who's responsible. Ensure regular updates are planned.

Audience	Message	Channel	Frequency	Owner
<i>E.g. Frontline staff</i>	<i>E.g. How it helps daily work</i>	<i>E.g. Face-to-face, team meetings, email</i>	<i>E.g. Weekly</i>	<i>E.g. Team leads</i>

Section 4: Training & enablement

Instructions: What training or resources are needed for people to adopt the change confidently. Describe training sessions, documentation, coaching, peer support, or help desk options. Specify who is responsible for delivery and when.

Group	Training format	Support resources
<i>E.g. Frontline teams</i>	<i>E.g. Live walkthroughs + practice sessions</i>	<i>E.g. AskNicely guides, cheat sheets</i>

Section 5: Change timeline & milestones

Instructions: What are the major phases of your change initiative, and when should each be completed? Create a timeline with key milestones, deadlines, and ownership. Include planning, rollout, feedback gathering, and post-launch review.

Phase	Milestone	Date	Owner	Success criteria
<i>E.g Plan</i>				
<i>E.g Prep</i>				
<i>E.g Train</i>				
<i>E.g Go live</i>				
<i>E.g Evaluate</i>				

Section 5: Resistance management plan

Instructions: How will you identify and respond to pushback? Describe how you'll monitor resistance (e.g., feedback sessions, anonymous forms), and what actions you'll take to reduce friction (e.g., listening sessions, early adopter recognition).

Type of resistance	Strategy	Owner
<i>E.g. "Not enough time"</i>	<i>E.g. Streamline onboarding, time-saving use cases</i>	<i>E.g. Frontline leaders</i>

Section 7: Success metrics

Instructions: How will you measure the effectiveness of your change? List both qualitative and quantitative metrics, such as adoption rates, feedback scores, performance KPIs, or employee sentiment, and how they'll be tracked.

Metric	Target	Frequency	Source
<i>E.g. NPS or CSAT change</i>	<i>E.g. +10 points over 60 days</i>	<i>E.g. Monthly check-ins</i>	<i>E.g. AskNicely survey data</i>

Section 7: Sustain and reinforce

Instructions: How will you maintain the change over time? Explain how you'll embed the change into everyday operations. This might include follow-up training, leadership reinforcement, and progress check-ins.

Action	Frequency	Owner
<i>E.g. Celebrate wins (shoutouts, KPIs)</i>	<i>E.g. Weekly</i>	<i>E.g. CX team</i>

Tips for completing the template:

Collaborate cross-functionally: Involve leaders, frontline staff, and support teams early on to ensure all perspectives are captured and aligned.

Be honest and specific: Clearly identify potential challenges, resistance, and needs. The more realistic your inputs, the more effective your plan will be.

Use real examples: Refer to past change initiatives (successful or not) to inform your stakeholder planning, communication strategy, and sustainability efforts.

Start small if needed: You don't need to have all the answers on day one. Begin with a draft, gather feedback, and refine it over time.

Assign clear ownership: Use tools like the RACI framework (Responsible, Accountable, Consulted, Informed) to ensure each step is managed effectively.

Make it a living document: Revisit and revise the plan regularly as the change progresses. Use it as your north star, not a one-and-done checklist.