

Organizational Readiness Self-Assessment

Identify gaps in your change strategy

A full return on investment in CX technology can't be realized unless the tools, processes, and skills that come with it are fully adopted at all levels of the business that interact with it. This document is for those who want to locate gaps in the readiness of their organization to undergo a change as significant as adopting a new CX platform.

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1 Introduction

1.1 Change is inevitable

Especially when transformation requires new ways of engaging with customers, employees, and technologies. Change can be difficult, sudden, and may seem never-ending, but a proactive approach to managing change minimizes the disruptive effects.

Fortunately for you, you already understand the need for change management. Congratulations! You are on the path toward discovering just how ready you are for the change you are about to undertake.

If you happened upon this document by accident, or if your boss is forcing you to read it, make sure to read the **Change Management Guide** prior to continuing. The guide provides a foundation on the value and importance of a CM strategy.

1.2 What is this?

This assessment evaluates your preparedness and awareness for change across seven components for success:

- **Vision** — Define the vision of what your company will look like after the change.
- **Sponsorship** — Ensure active sponsorship for the change at the executive level.
- **Measures** — Set indicators to track the success of the change initiative.
- **Change team** — Get the culture ready to accept and move forward with change
- **Communications** — Keep everyone affected by the change informed.
- **Stakeholders** — Gain buy-in from those affected by the change.
- **Training** — Close knowledge gaps in areas required by the change.

1.3 Disclaimer

Genesys Telecommunication Laboratories, Inc. (hereinafter “Genesys”) does not assume, fulfil, or replace the role of a change management (CM) practitioner, or the responsibilities or implementation of a CM program or related functions. There are many effective, yet different CM methodologies to choose from. No single approach is enforced or recommended. Organizations often choose a method that aligns to their culture and complements existing programs.

2 Evaluate your components for success

The assessment should take approximately 20 minutes to complete. Refer to the **Change Management Guide** for clarification on terminology, definitions, and commonly used change management practices.

For each statement, enter the point value that best reflects your current condition. Each success component has a maximum of 20 points and a minimum of 4. Make sure to score every statement.

Answer	Strongly Disagree	Disagree	Neutral	Agree	Strong Agree
Score	1	2	3	4	5

2.1 Vision

Define a vision of what your company will look like after the change.

Statement	Score
We have a change vision — a strategic narrative of the future.	
Our change vision is not a replica of our mission statement.	
To those affected by the change, our change vision is relatable.	
Our change vision reinforces a common understanding of outcomes to achieve.	
Total score	

2.2 Sponsorship

Ensure there is active sponsorship for the change at the executive level.

Statement	Score
We have a C-level executive sponsor for the change.	
Our executive sponsor has the authority to resolve issues and make decisions related to the change.	
Our executive sponsor is visible to all affected by the change.	
It's clear to all affected by the change that our executive sponsor is committed to support the change until outcomes are realized and performance is stable.	
Total score	

2.3 Measures

Set indicators to track the success of the change initiative.

Statement	Score
We have defined metrics for the change initiative with processes in place for early warning when performance drops.	
Individuals and groups have redefined performance metrics during the transition phase of the change and for the expected future state.	
Everyone affected by the change can view their progress and performance at any time.	
We track and measure performance at least six months beyond the date of implementing the change.	
Total score	

2.4 Change team

Get the culture ready to accept and move forward with change.

Statement	Score
We have a change team with at least one dedicated change practitioner.	
Our change team has change management experience and/or is certified in a chosen change management methodology.	
Our change team has their own workstream, separate from commonly used project management phases.	
The change team has a change management strategy and plan to achieve the expected benefits.	
Total score	

2.5 Communications

Keep everyone affected by the change informed.

Statement	Score
Our messaging explaining the reason for the change is clear, concise, and consistent.	
We use different mechanisms to keep stakeholders affected by the change informed.	
We routinely measure the effectiveness of our change communications to stakeholders and resolve anything that impedes our efforts.	
We frequently collect feedback through different mechanisms from those affected by the change.	
Total score	

2.6 Stakeholders

Gain buy-in from those affected by the change.

Statement	Score
We assess our stakeholders' needs and identify competency gaps prior to training and implementation of the change.	
Our stakeholders are aware of the change and demonstrate a willingness to embrace or try out a new system or concept.	
We never attempt to eliminate stakeholder resistance. Instead, we take special care to mitigate.	
Our executive sponsor mobilized an effective team of change agents to champion change and support stakeholders.	
Total score	

2.7 Training

Close knowledge gaps in areas required by the change.

Statement	Score
Our training approach is not a one-time event, but ongoing with additional learning programs after change is implemented.	
We have sufficient training resources to build learning modules, execute delivery, and provide ongoing stakeholder support throughout all phases of the change initiative.	
We measure the effectiveness of our training program based on the change and take necessary steps to close any gaps in knowledge or ability.	
We employ various training methods for the change, and we're open to various systems or concepts (e.g., instructor-led, web-based, gaming).	
Total score	

3 Get your results

1. Transfer the total score for each success component to the Scorecard below.
2. Calculate the Cumulative Total for all seven components.
3. In the Readiness Matrix, locate your range based on your cumulative total. This is your overall organizational change readiness.

3.1 Scorecard

Component	Total Points
Vision	
Sponsorship	
Measures	
Change team	
Communications	
Stakeholders	
Training	
Cumulative Total	

3.2 Readiness Matrix

Range	Category	Evaluation
126–140	Differentiated	Change management is your key differentiator between change success or failure. The organization's response to change is both efficient and reliable to minimize risks and resistance, achieve desired outcomes, and maintain performance.
112–125	Defined	Many preparations for change have been defined and conditions are favorable. The organization is aware of change and attempts to respond appropriately, but it still encounters barriers that hinder efforts to successfully move change forward.
84–111	Consistent	The organization has some underlying change practices, but response is intermittent — it depends on the situation, current condition, or circumstance, but change is not in a formal consistent manner.
24–83	Random	The current environment is insufficient to successfully support change. The organization is either unaware or indifferent toward building a foundation for change. Response to change is random, often by chance. You go into change hoping for the best or in crisis mode due to some critical event or undesired outcome.

4 Now what?

Regardless of where you landed on the Readiness Matrix, there will probably be an obstacle or two preventing or delaying your path forward to implement change and improve your current organizational readiness.

4.1 Identify strengths

Build on your existing success. For all statements where you scored 4 or higher, celebrate these strengths with your team and use them to drive improvement.

4.2 Prioritize barriers

Locate all statement where you scored a 3 or less. These are barriers that restrain or obstruct progress for implementing change. Develop a plan to focus and act on eliminating these barriers.

4.3 Prioritize components

If you're unsure of which barrier to start with, locate success components with points totaling 15 or less. Those areas take precedence.

If you're still unsure what should be the top priority, then start with Vision, followed by Sponsorship. Change doesn't happen for its own sake; there is always a reason, and that reason should align with a vision of what the company will look like after change is implemented. Studies show that the number one contributing factor to the success of change is active sponsorship at the executive level.

4.4 Final thought

We encourage you to revisit the **Change Management Guide**. It provides a wealth of change management foundational context. The guide also includes many references to industry leaders in the field of change management.

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