Assessing Transition Readiness

Some organizational changes go smoothly, while others feel as though they are destined for failure from the start. While there are always unforeseen events and unavoidable situations that affect how a particular transition unfolds, there are also some general factors that make a transition go more or less smoothly. There are things that encourage people to let go of the old way of doing things; and other things that help people get through the uncertainties between the letting go and the beginning anew; and, finally, other things that make it easier for people to embrace the new way readily.

The assessment instrument that follows comes from years of studying organizations in transition and seeking out the reasons for the very different fates they encountered. We have not generated norms, but as a practical tool it has proved very useful. And so we are sharing it.

This assessment tool can be used in many different ways. An individual who wants a quick take on the organization's readiness can fill it out and get either reassurance or deeper concern from the results. But that is only one person's view, so consider giving it to a cross-section of people. How many? It depends on your purpose. If you are really trying to measure the climate in an organization before anything is done—and then comparing it to the results after transition-management actions have been taken—you'll probably want as many raters as you can get. But if your concern is just to demonstrate that people are showing some significant wear and tear from the transition that they are going through, then a carefully chosen cross-section dozen or two subjects may suffice.

However many participate, everyone should answer the questions from his or her own point of view. The views expressed here are individual—which is one reason that it may be useful to take them from multiple, and even divergent, perspectives. Anyone answering it should be honest and should resist the temptation to give an expected or the-way-it-ought-to-be answer. It is meant to give you a snapshot of how things are now, not how they'll be when everything falls into place.

Choose one:

___ I am completing this assessment for the organization as a whole.

___ I am completing for a specific site, division, or other part of our organization. Which one?

And answer this:

The change for which I am assessing our transition-readiness is as follows:

answer each question with the following numbers:

4 = The statement is definitely true or accurate.

3 = The statement is largely (though maybe not completely) accurate or true.

2 = The statement is only partly true or accurate.

1 = This is only occasionally (but not very often) true

0 = The statement is utterly false.

1	_____	Most people think that the change in question is a necessary one.
2	_____	Most people agree that—given the situation—the change represents the best way of dealing with it.
3	_____	The organization's leaders have shown that they are committed to the change.
4	_____	In general, the middle managers are behind the change.

5   _____ So are the supervisors or first-line managers.

6   _____ The details of the change are being communicated to those who will be affected as quickly as it is practical to do so.

7   _____ There are effective ways for employees to feed back their concerns and questions about the change.

8   _____ And those concerns and questions have, thus far, been responded to in a pretty honest and timely way.

9   _____ There aren't a lot of old scars or unresolved issues around here.

10   _____ The organization has a history of handling change pretty well.

11   _____ The organization's leadership has a history of doing what it says it will do/

12   _____ …and of saying what it is going to do before it does it.

13   _____ I think that if this is what the leadership wants to do, that they can pull it off successfully.

14   _____ Decisions generally get made in a timely fashion around here.

15   _____ When people get new roles or tasks, they can usually count on getting the training and coaching that they need to do them.

16   _____ When faced with new and challenging situations, the organization forgets turf-issues and gets problems solved.

17   _____ It is safe to take an "intelligent" risk in this organization; failure in a good cause or for a good reason isn't punished.

18   _____ There is a pretty widely understood vision of what the organization is seeking to become and to accomplish.

19   _____ While the higher-ranking people obviously get paid more, we feel like we're all in this thing together.

20   _____ People's commitment to their work here is as high as it was a year ago.

21   _____ Although the pace and extent of change around here is great, it is also workable.

22   _____ Management generally practices what it preaches.

23   _____ There is basically no argument about what the organization's problems are around here.

24   _____ The organization's leadership generally shows an awareness of and concern for how change will affect the rest of us.

25   _____ People generally understand how things will be different when the change is finished.

   _____ **TOTAL SCORE**

Evaluating the Results

If a number of people are filling out this form, add the scores together question-by-question, so that you can say what the "average" answer was on each item, as well as on the assessment as a whole. That way, you can identify weak links in the transition-management chain, as well as areas where things are pretty solid. It is useful to have an impersonal way to evaluate whether people think that the organization has a vision of the future or not—or whether the leadership is trustworthy. These are charged subjects, and it helps to be able to raise them in a way that doesn't blame.

In addition to giving you a read on the organization's strengths and weaknesses in terms of transition manageability, it can be used to measure changes over time—before-and-after results, to measure the impact of an announcement, an intervention, a problem that arises, a positive development that takes place. It can also measure transition readiness in relation to different changes. And finally, it can also measure differences between the climate in two parts of the organization or at two different levels of the hierarchy.

However you use it—whether informally with a handful of people or in an official all-hands survey—the **Transition Readiness Assessment** will provide you with objective data to help you prepare for a time of transition, to deal with it, and to measure how well you handled it when it has passed.

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