

DISCOVER

This tool is divided into five sections. The first section lists the outcomes that must be met during this phase. The second section lists the objectives of this worksheet. The third section lists the tasks that must be undertaken by leaders. The fourth section is a checklist of generic items related to change that need consideration during this phase. These items can be modified according to your organizational context. An example of how these can be modified to support the transition to SDL has been provided. The fifth section lists the research behind the guidelines and provided recommended readings to gain in-depth knowledge about this phase of the change process.

Outcomes

- Defined purpose statement for the change to SDL
- List of stakeholders who will play a role in the change process
- Qualitative and quantitative data to inform the change
- Success criteria and evaluation methods

Objectives

This section helps learners and leaders

- Evaluate success
- Determine lessons learned and next steps
- Identify next change opportunity

Tasks

- Review the questions in the following section
 - Adapt the questions to your context as needed
 - An example has been provided for convenience
 - Analyze data, consult stakeholders, and determine next steps
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Checklist

- ☐ What went well and what could be improved?

For example, new employees were highly engaged in online discussions and shared tips and tools for time management. Learning facilitators found it challenging to coach using the SDL model and will benefit from coaching tools.

- ☐ Has the defined success criteria been met?
- ☐ How do we build on this initiative?
- ☐ How have the internal and external environments evolved during this transition?
- ☐ What needs to change next?
- ☐ How do we encourage stakeholders to be proactive in identifying change opportunities?
- ☐ How do we keep communication channels open?
- ☐ What organizational strengths and areas for improvement have we discovered throughout this process?
- ☐ What key take-aways should be considered for future change?
- ☐ What more needs to be done to build a culture that embraces and adapts change?

Those who want to discover the effectiveness of their actions should reflect on the following questions:

- ☐ Do I perceive my knowledge to have increased as a result of this change?
- ☐ Do I employ strategies from the Learning with Purpose model?
- ☐ Do measurements of success show the effectiveness and insights of the change? (Al-Haddad & Kotnour, 2015)
- ☐ Can I more effectively navigate the learning communities of which I am a part?
- ☐ Would I be as capable of navigating these systems without this learning?
- ☐ Do I exhibit behavioural changes from these activities that can I use in further organizational changes?
- ☐ Did some factors contribute to the change more than others? Can I employ those contributing factors towards future changes? (Al-Haddad & Kotnour, 2015)
- ☐ What has worked well?
- ☐ What needs to be improved?

References

Al-Haddad, S., & Kotnour, T. (2015). Integrating the organizational change literature: a model for successful change. *Journal of Organizational Change Management*, 28(2), 234–262. <https://doi.org/10.1108/JOCM-11-2013-0215>