STAIRS

Stakeholders together adapting ideas to readjust local systems to promote inclusive education

CHANGE MANAGEMENT TOOLKIT

Tool No. 10.

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Tool #10. Success Metrics Overview

**Target group (who can use it)**

Change leaders and managers

Short description

This tool allows change leaders to take the pulse to the change process. The „Detailed description of the tool and required material, attachments" must be read and the template below filled in to initiate the process of assessing change success.

Detailed description of the tool and required material, attachments

When implementing a change in the workplace, it is imperative to have success metrics. Success metrics can be defined as the metrics that help leadership to assess the overall health and achievement of the change. Success metrics are useful across all levels of the organisation as they evaluate, indicate, and measure performance based on the objectives set forth by the change initiative. From a leadership standpoint, they help leaders understand the initiatives overall impact. Many of these metrics include specifics on how many professionals are affected and how the change has impacted their engagement.

The graphic below shows the cycle of determining and tracking success metrics for the change initiative.
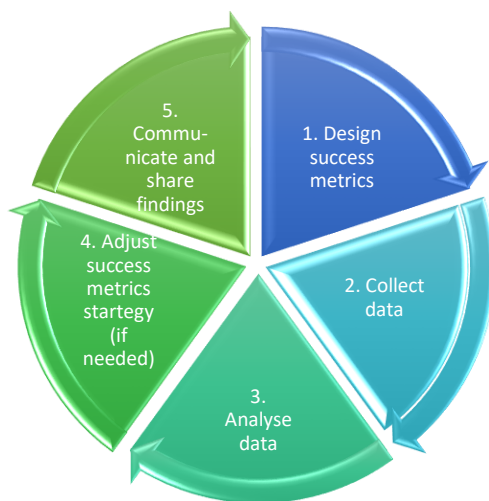
Success Metrics are quantitative data obtained from:

- Change Target Satisfaction
- Financial Performance (e.g., cost, revenue)
- Operational Performance (e.g., rework, lead time, handoffs)
- Service Quality (e.g., quality, defects, volume, frequency)
- Public Outreach (e.g., number of people impacted)
- Supplier Performance (e.g., reliability, durability)

Feedback is qualitative data obtained from:
- 1:1 Meetings
- Team Meetings
- Focus Groups
- Surveys
- Open Comment Box (Live URL available 24/7)
- Incentivised feedback

Success metrics and feedback are used to understand the current landscape of the change effort through all stages of the initiative. Quantitative data can be disseminated via metrics reporting. Qualitative data must be combined and grouped into common themes to bubble up relevant information. For transparency, all impacted employees must be provided the outcome of the metrics and feedback provided to leadership.

Pre-Implementation – gather success metrics

Use the time before implementation occurs to hypothesize possible success metrics tied to the change objectives. These metrics should be defined before Day 1 of the Pilot, Big Bang, or Phased Big Bang kick-off. The STAIRS Country Reports provide useful data for doing this.

Implementation – Pilot, Big Bang, or Phased Big Bang kick-off

The first three months is the learning curve period. During this time, expect many of the metrics to be volatile. Typically, after three months the data will start to normalise, and a true pattern of the strategy's performance will emerge.

Post Implementation – monitor, control success, and promote continuous improvement

By the end of the testing period the change strategy should now be evergreen in your department. To ensure its continued success, monitor and keep all success metrics visible to the users at hand. Update these metrics with a particular cadence (weekly, bi-weekly, etc) and have conversations around achievements or improvement opportunities as they arise throughout the year.

Ongoing monitoring of metrics ensures a feedback loop for continuous improvement. This feedback helps leadership to understand that no one process is forever optimal. By maintaining the conversation of metrics, we can collectively celebrate success while continually exploring improvements together.

Users' guide, equipment

Equipment	Quantity
Success Metrics Template	As many as necessary

Level of difficulty (easy, medium, advanced)

Advanced

Tags

Taking the pulse to the change process

Success Metrics Template

What is changing?	What is the measure?	Success metrics data category	Currently exists as a metrics (Y/N)	Data owner	Frequency
…					

Success Metrics Data Categories

Financial Performance (e.g., cost, revenue)	Operational Performance (e.g., rework, lead time, handoffs)	Service Quality (e.g., quality, defects, volume, frequency)
Sponsors and beneficiaries' satisfaction	Public Outreach (e.g., number of people impacted)	Supplier Performance (e.g., reliability, durability)

Adapted from Berkeley University of California, Change Management Toolkit