

Case for change guidance

To succeed with change, you need a clear and shared understanding of why the change is needed and what success looks like. A strong case for change builds understanding and support and provides a basis for approvals, engagement and consistent communication.

How to do it

When building a case for change, cover both:

- **the rationale** – the outcomes the change will deliver (for example service delivery, risk mitigation, efficiency or compliance), supported by evidence
- **the emotional response** – what the change will feel like for people, what will change in daily work, and what support will be provided during transition.

Involve stakeholders in shaping the case for change, particularly the sponsor and leadership team. A short workshop or structured discussion is often the most efficient way to build alignment.

Keep the case for change succinct and specific. Start with a version for the sponsor and project team, then tailor it for other audiences.

You should involve stakeholders in crafting your case for change, particularly members of your organisation's leadership team. A good way of achieving this is in a group discussion or workshop.

A case for change should include:

- **The problem or opportunity:** what is driving the change and why action is needed now, including what may happen if no action is taken.
- **Evidence:** the most compelling qualitative and quantitative evidence, such as data, insights, risk findings and service impacts.
- **The change:** what is changing and what is not changing, including timeframes and key milestones.
- **Benefits and trade-offs:** expected benefits, costs and impacts, with transparency about trade-offs and constraints.
- **What it means for people:** likely impacts, available support, and how people can ask questions and provide feedback.
- **How success will be measured:** success measures and how progress will be monitored.
- **How it will be governed:** sponsor, decision rights and where people can go for support.

Test the case for change with a small set of stakeholders who have different perspectives, including both supportive and sceptical views, and refine it based on feedback. The aim is speed and clarity, not perfection.

Where the change may have significant workforce impacts, engage HR / People and Culture early to ensure obligations and consultation requirements are considered.

Case for change template

Explaining the change

Title of change	<i>Provide a short, clear name for the change.</i>
Description of change	<i>What is the essence of the change – a one-line description?</i>
Imperative for change	<i>What problem are we trying to solve? What opportunities might be missed if we do not change? What will happen if we do nothing?</i>
Evidence	<i>Summarise the most compelling qualitative and quantitative evidence such as data, insights, risk findings, customer feedback, operational impacts.</i>
Alignment to priorities	<i>How does this change align to strategic priorities and/or required obligations (for example legislative, Machinery of Government (MoG), safety, security or risk mitigation requirements)?</i>

Describe the future state

What will be different?	<i>What will change in the future state, such as processes, systems, roles, service delivery or behaviours?</i>
What will not change	<i>Be explicit about what is not changing to reduce uncertainty.</i>
What it means for people	<i>What will people need to do differently? What impacts are anticipated, such as changes to roles, workload, capability or ways of working?</i>

Define success

Success measures	<p><i>How will we know the change is being adopted (for example usage, compliance or behaviours)?</i></p> <p><i>How will we know the change is delivering results (for example service outcomes, efficiency or risk reduction)?</i></p>
Benefits and trade-offs	<p><i>Describe the benefits for:</i></p> <ul style="list-style-type: none"> • <i>people (employees)</i> • <i>the organisation</i> • <i>and government and/or community (where relevant)</i> <p><i>Be transparent about key trade-offs and constraints, such as time, cost, disruption.</i></p>

How it will be delivered and supported

Approach and timing	<p><i>High-level milestones, sequencing and any phasing or pilots.</i></p>
Support during transition	<p><i>Training, job aids, coaching, time-to-learn, manager enablement, support pathways, stabilisation support (where required).</i></p>
Governance and decision-making	<p><i>Sponsor, decision rights, escalation pathways and reporting cadence.</i></p>
Questions and feedback	<p><i>Where can people go for information, questions and feedback? How will feedback be acknowledged and responded to (for example “you said, we did”)?</i></p>