

Developing your case for change

To succeed with change you need a vision and common understanding of why the changes are needed. This helps build understanding and support and is the basis for seeking senior management approval.



Templates to help with developing the case for change

[The case for change](#)

How to do it

When building a case, focus on:

- The rational side of change – the tangible improvements that change will deliver
- The emotional case for change – the reactions of how people will feel as a result.

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.



Instructions for involving stakeholders

[Read more about managing your stakeholders](#)

Try to keep your case for change succinct and to the point. Your initial audience is the project team and sponsor, and your case can be adapted later as part of the stakeholder engagement process. The case for change should include:

- **The problem:** You need to convince people that the problem is a priority and needs to be fixed. If possible, appeal to the rational side by producing a 'killer graph' which sums up the issue. For example, this could show that citizen satisfaction of your services has been declining over time and is about to slip below the baseline. An emotional appeal needs to target different motivational drivers. For example, some stakeholders care deeply about their team, some think about citizens and the community, while others will consider the personal impact.
- **The change:** Explain your case in a compelling way so that people feel inspired to change their behaviour. It's also important to define what is required of everyone to achieve the vision. The timeframe for implementation should also be outlined.
- **The benefits:** Build trust and credibility by being honest about the benefits. For example, if cost-cutting is involved, don't avoid disclosing this as a benefit. However, make sure you speak with HR about any requirements within Enterprise Agreements or other agreements that may affect employees.

Test your case for change with key stakeholders and networks in your organisation and make any refinements. The testing shouldn't take too long especially if you target selected individuals who have a stake in the outcome.



Adjust for scale

Type of change	Guidance on how to apply this process
Small: Improving and refining methods, policies and procedures; the future state is not very different to the current ways of working	<ul style="list-style-type: none">• The case for change should follow the template, but may only need to be brief.• Testing will either not be required or be very limited.
Medium: Distinct modifications to strategies, structures and/or management processes	<ul style="list-style-type: none">• The case for change process should be followed in full.
Large: Substantial realignment, restructuring and/or transformation of all or part of the organisation	As above plus: <ul style="list-style-type: none">• The case for change must come from senior leaders such as chief executives who must be involved in its creation, refinement and communication.• Be clear about the level of disruption the change will bring and that the benefits are sufficiently large to justify any impact.

Success measures

The case for change will succeed if it is clear, specific, measurable and guides the entire project.

Have another go if your case is too general or high level to be useful.

