🧭 Change Impact Assessment Workshop Facilitation Guide

Use this guide to run an effective, structured session that brings stakeholders together to identify, discuss, and document potential impacts of a planned change. This works especially well when input is needed from across departments or when impacts are complex or cross-functional.

✅ Workshop Goals

- Identify key impacts of a proposed change initiative
- Capture input from stakeholders across functions
- Categorize and prioritize impacts based on severity, urgency, and type
- Build alignment and shared understanding of the change scope

🗂️ Workshop Overview

Format:
Live (virtual or in-person) collaborative session with structured facilitation

Duration:
60–90 minutes (depending on complexity and number of stakeholders)

Participants May Include:

- Change Manager or Facilitator (leads session)
- Project Sponsor or Business Owner
- Functional Leads / Process Owners
- Affected End-User Representatives
- HR, IT, Legal, or Compliance (if applicable)

🧩 Pre-Session Preparation

- Define the **scope of the change** clearly in one slide or handout
- Bring any existing documentation: stakeholder list, org charts, system maps
- Set up your chosen tool (e.g., Google Sheet, Miro, PowerPoint canvas, printed sticky note board)
- Pre-populate basic categories: People, Process, Technology, Policy
- Create breakout groups if running virtually or with a large team

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🧠 Suggested Agenda (90 minutes)

1. Welcome & Purpose (5 mins)

- Introduce the session goal and agenda
- Frame the change initiative briefly
- Set expectations (e.g., open sharing, brainstorming encouraged)

2. Overview of the Change (10 mins)

- Present a high-level summary of the change
- Outline known change drivers, timeline, and affected areas
- Clarify what is in scope and what is not

3. Impact Brainstorming (30–40 mins)

Facilitator guides participants through structured questions:

- "Who will be impacted by this change?"
- "What workflows or tools will change?"
- "What roles or responsibilities might shift?"
- "What are the downstream effects — systems, customers, vendors?"
- "What surprises us or makes us uncomfortable?"

Use breakout rooms if needed. Participants capture impacts using sticky notes, a shared Google Sheet, or an impact mapping board.

4. Categorize & Prioritize (15–20 mins)

As a group or in small teams:

- Group the impacts into categories (People, Process, Tech, Policy)
- Assign severity (Low/Med/High) and urgency (Now/Soon/Later)
- Flag those that need further clarification or follow-up

5. Share & Align (10–15 mins)

- Each group presents highlights and top concerns
- Capture overlapping impacts or conflicts
- Document alignment, disagreements, and any open issues

6. Wrap-Up & Next Steps (5 mins)

- Thank participants
- Recap major findings
- Explain how impact data will be used (e.g., communication, training, resistance planning, etc.)
- Share next steps and follow-up plan

🛠️ Tools You Can Use

- Google Slides/Sheets or Miro for digital sticky-note collaboration
- Printouts or pre-drawn canvases for in-person sessions
- Color-coded sticky notes to group by impact type or severity
- Facilitator prompt sheet to guide discussion and probe deeper

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📝 Output to Capture

- Raw impact notes by group
- Completed or partially completed Impact Assessment Table
- Prioritized list of high-risk impacts
- Identified gaps in knowledge or analysis
- Stakeholders who need deeper 1:1 follow-up