

Purpose of Readiness Survey

Readiness surveys are conducted to measure the progress people are making as they get ready for change. Shortly after a change is announced, the first readiness survey is conducted to establish a baseline to compare with future surveys. Readiness is measured throughout the entire project to know how people are progressing toward full adoption. After collecting survey results, analyze the results and plan the next OCM actions to move people to a higher level of readiness. Continue with surveys and action plans until people are fully prepared for change.

Readiness Survey Approach/Considerations:

- Select an anonymous survey tool to encourage high levels of participation (e.g. Survey Monkey)
- Plan for several surveys throughout the project, perhaps linked with the timing of key milestones. You can expect to conduct 3 or more surveys.
- Decide whether you need to survey all end users, or perhaps a representative from each team would be sufficient. (change the words from “I” to “we” as appropriate.)
- Consider who would be the best sender of the survey to receive the best response rate.
- For exact comparisons, survey-to-survey, it’s best to keep questions consistent for all surveys, even if key activities have yet to occur (e.g. I feel like I am prepared to use the new system – before training has taken place.) Include N/A option when appropriate.
- Using a Likert scale with words is easier to understand than number choices, for example:
 - Strongly agree
 - Agree
 - Neither agree nor disagree
 - Disagree
 - Strongly disagree

Analysis of Survey Results:

- Analyze survey responses by stakeholder group to determine the OCM follow-ups needed to take people to their next level of readiness. (Don’t assume all stakeholder group responses will be the same, or that all OCM follow-up actions will be the same.)
- Based on your analysis, update OCM Plans (Comm Plan, Sponsor Roadmap, Training Plan, etc.) with appropriate next steps and actions.
- Compare results of each survey to ensure the organization is moving the right direction and becoming increasingly ready for the change.
- Publicize the results so people and sponsors know and celebrate the progress and also see the additional work needed to get ready.

Sample Organizational Readiness Survey Questions

1. First, determine how data will be analyzed (e.g. by department, by role, etc.) and ask questions to understand who is answering the survey, such as:

- Please select your department:
- Please select your role on <enter project name>:

2. Include questions/statements to determine the level of capacity and perceived need for the change.

- My team understands the need for <enter project name>. (or, reword to “I understand...”)
- My team understands the importance of <enter project name> and has the capacity to dedicate the necessary time to it.

3. Include questions/statements to determine the AWARENESS and perceived need for the change.

- My team has been informed about <enter project name> and its expected benefits. (or reword to “I have been informed...”)
- In our team meetings, we discuss how <enter project name> will impact our team.
- We are aware of the timeline for the <enter project name> launch.
- The <enter project name> project team is sharing the information we need to stay informed.

4. Include questions/statements to determine the level of DESIRE for the change

- We (or “I”) agree with the vision of <enter project name> and believe that it will meet the needs of our team (and/or our customers.)
- My team feels that leadership actively supports the <enter project name> program and encourages us to support it.
- We are supportive of the change.

5. Include questions/statements to determine the level of KNOWLEDGE to make the change

- We understand how <enter project name> will impact our day to day work, including work processes, job roles, and technology.
- I know how I will need to perform my job role after the project launches.

6. Include questions/statements to determine the ABILITY to change

- My team has received the tools, training, and documentation needed to successfully support the new ways of doing things after <enter project name> launch.
- I am confident I will be able to do the work that is expected of me when the <enter project name> launches.

7. Include questions/statements to determine the level of REINFORCEMENT being provided or needed for the change.

- My supervisor/manager is involved and helping us prepare for the change.
- I have had the opportunity to practice what I learned in training.
- We have a process for asking questions and receiving support as we prepare for change.

8. End each survey with an open-ended question, such as:

- Please provide any feedback about the <enter project name> program, the <enter project name> launch, or additional information or training you may need.