



## Checklist to Assess Client's Readiness for Change

Before you and your client start your project for organizational change, you both should determine whether your client's organization is really ready for that change. This is a critical determination to make. Below are several questions to guide you. Next to each question below, indicate whether you and/or your client believe that your client's organization is really ready. The final determination is up to you and your client. If you conclude that the organization is not yet ready, then use the considerations in the right-hand column to determine how your client might get ready and when you might be able to begin your project.

<b>Readiness Questions</b>	<b>Yes – Ready!</b>	<b>Not Ready</b>	<b>Considerations if not ready</b>
1. Does the client have any funds budgeted for the project?			How can your client get funds in time to start a project soon?
2. Are there no major obstacles to the project starting soon?			If there are obstacles, what are they? How might they be overcome?
3. Are there no major events that will take a great deal of time away from the project?			If there are events that will interfere with the project, what are they? How can they be addressed?
4. Is your client open to other perspectives than theirs about the project?			How can your client become more open to other perspectives?
5. Is your client open to hearing about what might be their role in any issues found in the organization?			How can your client become more open to hearing about their role?
6. Your client has not had any difficulties using consultants before?			If difficulties were experienced, what were they? How can your project avoid those experiences?

### Checklist to Assess Client’s Readiness for Change (cont.)

Readiness Questions	Yes – Ready!	Not Ready	Considerations if not ready
7. There were no important people missing from your initial meeting(s) with your client?			If there were important people missing, who were they? How will they get involved in the project?
8. Can you, the consultant, be assured access to necessary resources for the project?			If not, then how will you get access to those resources?
9. There are no activities or people who are “off limits” to the project?			If there are things that are off-limits, then why? Should they be accessible to the project?
10. There are no people who might be uncomfortable with the project?			If there are people who would be uncomfortable, then what should be done?
11. Does your client really have the time and energy to participate in your project?			If not, then how will they make the time and energy?
12. There are no “red flags,” or feelings of concern on your part?			If there are, what are they? How can they be addressed?

If you have any checks in the “Not Ready” column for any of the 12 items, then consider addressing the questions in the right-hand column for that item. Considering creating an action plan based on the answers to questions in the right-hand column. Work with key individuals to execute that plan and set a schedule for getting back to starting the project.