

THE CHANGE READINESS PLAYBOOK

A Practical Framework for Delivering Learning Before Users Need It

Introduction

Most learning teams aren't struggling to create training. They're struggling to create it before employees need it.

When software updates, process changes, and new tools arrive faster than enablement teams can respond, employees are left to figure things out on their own. The result is slower adoption, increased support requests, and inconsistent ways of working.

The most effective organizations reduce this gap by treating change readiness as a repeatable process—not a last-minute training request.

This playbook will help you quickly assess incoming changes, determine the appropriate enablement response, and deliver support where employees are most likely to use it.

Why It Matters

Organizations that consistently prepare employees before change goes live experience:

- Faster user adoption
- Fewer support tickets and help requests
- Reduced productivity loss during transitions
- More consistent process execution
- Greater confidence in new tools and workflows

How to Use This Guide

Use this worksheet whenever a software update, workflow change, process improvement, or new system rollout is introduced.

Work through each section in order to assess the change, determine the appropriate enablement response, and create a plan for delivering support before users need it.

Part 1: Change Intake

Objective: Capture the key facts before deciding what to build.

Change Information

Change Name

System / Process:

Business Owner:

Planned Go-Live Date:

Date You Learned About It:

Lead Time Available: _____ days

Audience Impact

Who will be affected?

- Entire organization
- Multiple departments
- One department
- One team
- Specific role
- Small group of users

Behavior Impact

How much will employees need to change what they do?

- Major workflow change
- Moderate process adjustment
- Minor update
- Informational only

Risk Assessment

If employees continue using the old process, what happens?

- Productivity decreases
- Errors increase
- Customer experience suffers
- Compliance or security risk
- Revenue impact
- Little to no consequence

Initial Assessment

Does this change require employees to do their jobs differently?

- Yes
- No

If No, a release note may be sufficient. If Yes, continue to Part 2.

Part 2: The Response Matrix

Objective: Match your enablement effort to the size of the change.

Use the matrix below to determine the appropriate response.

Audience Size	Behavior Change	Recommened Response
Large	Large	Full Enablement Build
Large	Small	Lightweight Support Asset
Small	Large	Direct Coaching & Targeted Support
Small	Small	Release Note Only

My Assessment

Audience Size:

Behavior Change:

Selected Response:

Success Criteria

How will you know employees are ready?

- Can complete the task without assistance
- Fewer support requests
- Fewer process errors
- Adoption target achieved
- Manager confirmation
- Other:

Part 3: Build the Fastest Version

Objective: Choose the fastest path to employee readiness.

Delivery Format

What is the fastest format that will solve the problem?

- Interactive walkthrough
- Embedded guidance
- Short video
- Job aid
- Knowledge article
- Team meeting/demo
- Direct coaching
- Release note

Build Planning

Question	Answer
Who owns development?	
What environment will be used?	
What approvals are needed?	
Target completion date?	
Final reviewer?	

Speed Check

- Estimated time using capture-based content: _____ hours
- Estimated time creating from scratch: _____ hours
- Estimated time saved: _____ hours

Readiness Checklist

- Access to environment secured
- Content owner assigned
- SMEs identified
- Build timeline confirmed
- Review process defined

Part 4: Deliver in the Flow of Work

Objective: Make support available where employees actually need it.

Delivery Plan

Delivery Layer	Planned	Owner
Embedded support (in-app, walkthroughs, guidance)	<input type="checkbox"/>	
Searchable resource (LMS, KB, Help Center)	<input type="checkbox"/>	
Awareness campaign (email, Slack, release note)	<input type="checkbox"/>	

Access Audit

Can employees access support...

Question	Yes	No
During work?	<input type="checkbox"/>	<input type="checkbox"/>
At the moment of need?	<input type="checkbox"/>	<input type="checkbox"/>
Through search?	<input type="checkbox"/>	<input type="checkbox"/>
Without contacting a manager?	<input type="checkbox"/>	<input type="checkbox"/>
Within two clicks?	<input type="checkbox"/>	<input type="checkbox"/>

Go-Live Plan

Support assets available by:

Communication date:

Owner:

Part 5: Stay Ahead of the Next Change

Objective: Reduce future response times by improving visibility into upcoming changes.

Stakeholder Map

Who should notify your team before changes are finalized?

Stakeholder	Current Relationship	Action Needed
Product Team		
IT Team		
Operations		
Business Leaders		
Vendors / Partners		

Early Warning Checklist

- Included in implementation meetings
- Included in release planning discussions
- Included in change management reviews
- Receive roadmap updates
- Receive vendor release notifications
- Attend quarterly planning sessions
- Defined escalation path for urgent changes

Next Opportunity

What is one relationship or process that would help your team learn about changes sooner?

The Change Readiness Formula

Use this formula as a reminder for every future rollout:

Awareness + Triage + Fast Build + In-Workflow Delivery = Faster Adoption

Change Readiness Scorecard

Rate your current capability.

Capability	Green	Yellow
We learn about changes early	<input type="checkbox"/>	<input type="checkbox"/>
We consistently triage requests	<input type="checkbox"/>	<input type="checkbox"/>
We choose the right response level	<input type="checkbox"/>	<input type="checkbox"/>
We build support quickly	<input type="checkbox"/>	<input type="checkbox"/>
Support is available in the flow of work	<input type="checkbox"/>	<input type="checkbox"/>
Employees can easily find help	<input type="checkbox"/>	<input type="checkbox"/>
We have a process for future updates	<input type="checkbox"/>	<input type="checkbox"/>

30-Day Action Plan

Biggest Bottleneck

What currently slows your response to change the most?

Highest-Priority Improvement

What is one improvement you will make in the next 30 days?

Ownership

Who is responsible?

Target Date:

Training Speed Gap Goal

- Current Gap: _____ days
- Target Gap: _____ days

Final Takeaway

Change is inevitable. Employee confusion doesn't have to be.

The organizations that adapt fastest aren't the ones creating the most training—they're the ones delivering the right support before employees need it.

Measure one number consistently:

Days between learning about a change and delivering support for it.

As that number shrinks, readiness improves.

And when readiness improves, adoption follows.