

Change management · Leadership

Turn a system change into work your team can do

Explain the change through the task people will perform, the support they need and what managers will do when work gets stuck.

What you finish with: A short team change brief with one practice task, an owner for support and a check that the new way works.

[Read this guide online](#)

PEOPLE / ADOPTION

Make the new work possible.

01

Explain the change

What changes in the task, what stays and why it matters.

02

Make room to practice

Time, access and support. Include a common exception.

03

Check actual use

Output quality, help needed and the obstacle to resolve.

Use the checkpoint to continue, change the support or adjust the rollout.

01 Make the change concrete

Choose one team and a recurring task affected by the change. Write what happens today, what will happen next, and what responsibility stays with that team. Describe the actual work: entering a forecast, reviewing a reconciliation, approving a request or producing a report.

Ask someone who does the task to walk through the proposed change. Capture missing access, unfamiliar steps, competing deadlines and concerns about responsibility. A leader's explanation and a user's ability to complete the task are different forms of evidence.

02 Give the manager something useful to say

Explain the reason for the change, the result the team is expected to deliver and the support available. Say what is decided and what is still open. If people ask how roles will change, give the confirmed answer and name who will answer what remains unresolved. Do not promise that jobs or responsibilities will stay the same unless that decision has been made.

Make room for the work. Name a task that will pause, a deadline that will move or the support that will cover practice time. If none can change, take that constraint to the person who controls the schedule before setting a rollout date.

03 Practice the task and resolve the obstacle

Use one representative example in the approved training environment. Let the intended user complete it, including a common exception. Watch where assistance is needed. Distinguish a knowledge gap from missing permission, unclear policy or a broken configuration; each needs a different owner.

At the first agreed checkpoint, check whether users can complete the work to the required standard and how much help it takes. Record the problem, fix and owner. Use those results to decide whether to continue, change the support or adjust the rollout. Attendance and positive feedback alone do not establish adoption.

Example team change

Moving forecast submissions into the planning system

Cost owners will submit their forecast assumptions in the planning application instead of emailing workbook versions to FP&A.

What changes:

Cost owners enter and submit assumptions in one approved version. FP&A reviews exceptions and returns questions in the same workflow.

What stays:

The cost owner remains responsible for the assumptions. FP&A remains responsible for the consolidated forecast and its review.

Practice:

Submit one cost-center forecast, correct a rejected assumption and show which version is approved.

Support:

The application owner fixes access and configuration. The FP&A lead answers assumption and approval questions. The manager agrees which routine report pauses for practice.

Check:

Can each affected user submit and correct the forecast with the right access? Record assistance and unresolved errors before expanding the rollout.

Your working record

TEAM CHANGE BRIEF

Field	Your record
Team / task:	
Today → New way of working:	
Business reason / result to improve:	
Responsibility that stays / responsibility that changes:	
One practice task and the required result:	
Time made available / work paused / manager:	
Access or support needed / owner:	
Question still open / who will answer / by when:	
First checkpoint / evidence to review / decision owner:	

[Open the guide to copy this record into your team's document](#)