TEMPLATE

Meeting in a Box

*About this tool*

**PURPOSE:** To provide an approach for managers and supervisors to use to engage employees in support of a change project

**AUDIENCE:** Managers and supervisors whose organizations and teams will be impacted by a change project

**USE and APPLICATION:**

* In a manager’s toolkit
* As part of a training plan
* Meetings with supervisory employees
* On an internal website (downloadable)

[Delete the above image and text when re-using this tool]

[This document needs to be customized to suit the change in question, you will see text such as “XYZ change” and “change project” that will need to be replaced with the actual project name or the actual change. Be sure to include any project visual elements or branding that will tie this tool to recognized project communications. Once the basic relevant content is integrated, a best practice is to engage a group of managers in the refinement of this tool to ensure that it has everything they may need]

# Overview

This document is intended to provide you with information and tools to support your employees in their transition to adopting XYZ change . It includes tips on engaging employees, key messages on changes, as well as a template for a meeting to gather employee feedback.

## Your role

XYZ change requires your support as a key partner in managing change for your employees, including:

* Informing employees of the changes to come, the decisions being made and why.
* Carrying the message of the benefits and opportunities associated with the change.
* Listening to employee concerns and communicating those concerns to the project’s change management team in order to address them.
* Supporting employees in adopting change.

## Types of meetings

There are several ways to engage employees in discussions about the changes to come. Below are some options for you to consider. Choose the approach that works best for you and your team.

* Take over a **regular staff meeting** to make a presentation and engage in a discussion that flows from your presentation.
* Schedule a **dedicated meeting** to address the changes in the new project.
* Schedule **informal meetings** with employees (e.g., lunch and learn) to discuss issues related to a modernized project.
* Use regular staff meetings to provide **brief updates** to your employees on the latest information and discuss key issues over time.

## Employee engagement

The change project will have varying effects on employees. You need to be attentive and responsive to your employees’ individual and collective concerns. A change can be an opportunity to initiate or enhance communication between you and your employees. Good communication can help turn a difficult situation into a pleasant experience and can be the beginning of a very positive culture change for the whole organization.

**Be open; be positive; be sensitive; communicate early and often.**

## Key points

[The content of this section needs to be customized to suit the change project include bullets describing each element that is changing in a succinct and clear way]

* Vision for the change project–Why is the organization/process/tool changing?
* Objectives of the project
* What is expected from each of you
* How can you participate
* How you will be supported
* Where to go to find out more information

# Meeting Template

## Meeting details:

| Date and time: | Host/manager(s): |
| --- | --- |
| Location of meeting: | Sector and team:  |
| Attendees: |

## Issues discussed:

| XYZ change |  |
| --- | --- |
| What’s changing for our team? |  |
| How will these changes impact our work? |  |
| What are the opportunities for improving how we work? |  |
| What elements will inhibit us from being productive? |  |
| What could be done to help limit the disruption we experience? |  |

## Decisions made as a group

| How can we have the project we will feel proud of? |  |
| --- | --- |
| How do we want to be treated as we adopt the change? |  |
| Other decisions |  |

## Follow up

| Actions for manager(s) | Actions for employees |
| --- | --- |
|  |  |

## Employee feedback

| Date and time: | Host/manager(s): |
| --- | --- |
| Location of meeting: | Sector and team: |
| On a scale of 1 to 5, please indicate your level of agreement with the following statements. | **1**Strongly disagree | **2**Disagree | **3**Neither | **4**Agree | **5**Strongly agree |
| I am well informed of the changes that will take place and that will impact me. |  |  |  |  |  |
| I was able to discuss and better understand some commonly held myths surrounding the change project. |  |  |  |  |  |
| I look forward to the changes. |  |  |  |  |  |
| I have the knowledge to be successful in this change. |  |  |  |  |  |
| I am confident I will be able to adapt to the XYZ change. |  |  |  |  |  |
| I was able to discuss with my team how we should prepare for this transition. |  |  |  |  |  |
| Please provide your comments about the session in order to continue to improve the tools and future workshops. |
| Were the discussions during the meeting relevant and meaningful to you? If not, please describe a scenario or discussion you would like to have incorporated into the meeting. |  |
| Are there any other tools or information that you would suggest for future meetings? |  |