

# CASE FOR CHANGE

## Initiation



### Case for change

People need reasons to change. A case for change is a concise collection of evidence that can be easily communicated to demonstrate the reasons for change and the risks of not changing. Taking the time to develop a strong case for change is a worthwhile investment as it will help stakeholders clearly understand the what, why and how of your project.

### Initiation

The purpose of this phase is to develop a clear understanding of what your project is, what you want to achieve and how you plan to get there.

## Key points

### 1. Begin with the problem or opportunity

Start by recording the reason you asked (or were nominated) to do this project. Is it due to an adverse event, or is the service no longer performing effectively or efficiently? Has there been emerging evidence of a better way to deliver care? Consider why this would be important to your managers and other staff. Seek out your organisation's strategic plan, and consider how doing this project will help to achieve a goal listed on the plan.

### 2. Gather the available evidence

Confirm the need for the change initiative using clear supporting evidence. Study the literature to find out and document what work has already been done and the outcomes. Use locally available data on service performance, quality indicators or patient demographics to demonstrate issues. See if predictive data are available, which can be useful for forecasting.

### 3. Determine the consequences

Consider how the current state is impacting on patient and staff experience, and how making a change would not only benefit the organisation, but also patients and staff. Use your evidence to forecast or illustrate the consequences if nothing changes or the current situation worsens. Include stories about the situation from staff and patients to demonstrate the personal impact.

### 4. Engage stakeholders

Once you have drafted your case for change, consider and test how the information you have can be packaged for presentation to different people. An effective case for change must appeal to different perspectives and drivers for change. For example, managers may be interested in how the change will improve KPIs and quality of care, clinicians may be interested in the clinical evidence, and executives may want to meet a strategic priority.

## Considerations and tips

Your case for change will be your reference point when you need to present or communicate about your project. Remember to keep it adaptable to the relevant group or situation and have it ready when the opportunity arises!

### Appeal to the head and the heart

Create motivation and urgency to change by capturing the heart and mind of your audience. Support your case for change with analytics and evidence, but also tell the emotive stories to highlight the human experience and impact.

### Consider stakeholders' perspectives

To help you engage stakeholders, put yourself in their shoes. Ask yourself, 'For this change, what's in it for me (WIIFM)?' The incentive may be a decrease in workload, time savings, reduced costs, etc. This will encourage buy-in and help get stakeholders on side.

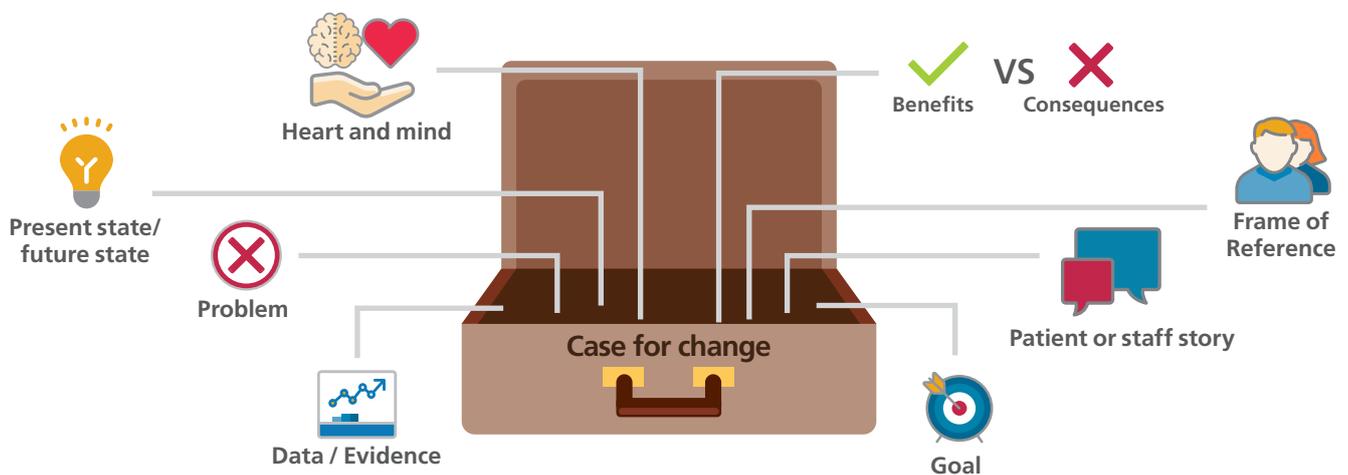
### Presentation tips

Learn how to communicate your case in different formats. Rehearse and test a rapid fire 30 second version for when you need to deliver it fast, as well as five and 30 minute presentations for different occasions. Develop one page information sheets and use visual cues, photos and graphs or charts to communicate efficiently.

### Communication

The case for change needs to be communicated in multiple ways to get the message across. Consider several modes of communication such as steering committees, newsletters, staff meeting presentations, elevator grabs and other informal opportunities.

## Case for Change



## Further information

Making your case for change – [www.shb.scot.nhs.uk/board/pfpi/documents/CaseForChange.pdf](http://www.shb.scot.nhs.uk/board/pfpi/documents/CaseForChange.pdf)

## Next Steps

Your case for change will grow and strengthen in the diagnostics phase of redesign, so be prepared to continue to refine it as your project evolves. Now that you have your case for change ready, you should think about defining your goals. Setting a goal will help focus your project and keep you on track to success.