

Change Agent Contract Worksheet



The **Change Agent Contract Worksheet** provides a framework for clarifying roles and expectations in change. Given the often ambiguous nature of change, this is a critical step to ensuring that each contributor is set up for success.

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As a change agent, you play a vital role in contributing to effective change execution.

Given that working with change is high in both opportunity and risk, it's important to be very precise in defining and executing your role.

Setting You Up for Success

One of the most constructive and positive steps you can take as a change agent is to set up a deliberate “contract” or set of expectations for your role. This is not only helpful to your change sponsor and leaders, but it's also a powerful technique to position yourself for success.

Use this contract template to guide a conversation with your change sponsor or leaders and clarify expectations for your role.

**“The change agent is the roadie,
not the rock star”**

– Jennifer Frahm
Conversations of Change

Change Agent Contract	
Relationships	
Who is the change sponsor that I will be supporting?	<i>E.g. The CEO</i>
How can we best collaborate?	<i>E.g. Through one-on-one meetings held each week on a priority basis</i>
How will we manage access to information/decisions?	<i>E.g. Establish an agreement that I will need access to confidential information in order to plan the change</i>
How will we track our progress? What data or information will be used?	<i>E.g. Use the Evaluation Framework's main key performance indicators to track progress monthly and report to our Transformation Team</i>
Who can support my role as change agent?	<i>E.g. My Director can help protect my time to dedicate to the change initiative</i>
How should I raise concerns or risks?	<i>E.g. At the weekly one-on-one meeting with CEO</i>



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Responsibilities	
What are my responsibilities for supporting the change?	<i>E.g. Developing and implementing the Change Management Plan</i>
What is my decision-making authority?	<i>E.g. Empowered to make decisions on spending within the established budget, making recommendations to the CEO on strategic direction, authorized to make day-to-day tactical decisions</i>
What am I accountable to deliver?	<i>E.g. The Change Management Plan, the deliverables identified in the Plan, monthly project updates</i>
How should I balance my change role with my business as usual functions?	<i>E.g. Fully dedicated to the change project for the next 12 months</i>

Protecting Yourself from Risk

In order to mitigate against the risks inherent in transformation, follow these 3 Golden Rules for Change Agents:

- 1** **You cannot work harder or care more than the change sponsor.** Only the change sponsor can create the conditions for change success because it requires authority and legitimacy. That role cannot be delegated to a change agent, however enthusiastic or capable that person may be. Be alert to this dynamic and ensure that you are set up for success. Your role is in *service* to the change sponsor. Your function is to *support* the sponsor, not to replace that role or compensate for gaps in leadership.
- 2** **Do not take bad business.** Bad business occurs when sponsors do not effectively follow-through on the requirements to provide leadership and address the political, logistical or resource challenges facing the initiative. This leaves change agents vulnerable to a mission impossible situation, as change failure is certain. In such a situation, you must raise concerns about sponsorship and renegotiate the parameters of your expected role.
- 3** **Manage your energy, not just your time.** Working on change is particularly demanding and exhausting. You are very much building the plane while flying it. Consider strategies for how you can manage your energy – seeking opportunities that fill you with positive vibes, and mitigating against situations that are draining.