**Checklist**

This checklist is to be used as a guide only and ultimately it is your choice as to which documents to use and how.

We would suggest that some documents are used by everyone, while others are more relevant to larger organisations with numerous stakeholder groups across more than one geographical areas. However, it is of course up to you if you wish to use or not use any part of the playbook.

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| **Document** | **Part of Playbook** | **Type** | **Usage advice** |
| Overview document | Part 1 - Plan | Street Manager information | Everyone |
| Business case | Part 1 - Plan | Template with relevant Street Manager information | Everyone |
| Impact assessment | Part 1 - Plan | Tool with guidance | Everyone |
| Readiness assessment | Part 1 - Plan | Tool with guidance | Everyone |
| Stakeholder analysis | Part 1 - Plan | Tool with guidance | Large organisations with different stakeholders / stakeholder groups |
| Personas | Part 1 - Plan | Guidance document | Large organisations with different stakeholders / stakeholder groups |
| High-level roadmap | Part 1 - Plan | Template with relevant Street Manager information | Everyone |
| Delivery and roll-out plan | Part 1 - Plan | Template with relevant Street Manager information | Everyone |
| RACI | Part 1 - Plan | Guidance document | Organisations with many people involved in the planning and delivery of the transition to Street Manager |
| Risks, issues and actions log | Part 1 - Plan | Template / tool with guidance | Everyone |
| Change management strategy | Part 2 - Deliver | Guidance document and template | Everyone |
| Communications approach | Part 2 - Deliver | Guidance document and template | Everyone |
| Training approach | Part 2 - Deliver | Guidance document and template | Everyone |
| Engagement and Training Needs Assessment and Progress Tracker | Part 3 - Measure | Tool with guidance | Everyone - you can decide whether to go down to individual stakeholder or use stakeholder groupings based on the level of detail that suits you |
| Progress of Benefits tracker | Part 3 - Measure | Tool with guidance | Everyone |

**Suggested order of activities**

**PLAN**

1. Read through the **overview document** to understand the most up to date content on the Street Manager project
2. Do an initial read through of the **business case** to understand background
3. Conduct an **impact assessment** for technology, processes and people within your organisation
4. Complete the gap analysis and **readiness assessment**
5. If you are a larger organisation, use the readiness and impact assessment to complete the **stakeholder analysis** documentation (*optional*)
6. Based on the stakeholder analysis, create your **personas** and then allocate each stakeholder to a persona group (*optional*)
7. Create the first draft of the **high-level roadmap** noting the key activities that need to take place prior to transition
8. Complete the provided **business case template,** adding details such as the benefits assessed in the benefits management approach. Pass on the business case to those who need to see and approve it
9. Using the high-level roadmap and the readiness assessment, create a **delivery and rollout plan**
10. Conduct a **RACI assignment** based on the delivery and rollout plan that allocates responsibility for the completion of each task (*optional*)
11. Make sure that you have communicated the transition plan and detailed as relevant to your **highway / street and roadworks teams**
12. Make sure that you have communicated the transition plan and detailed as relevant to your **contractors**
13. Make sure that you maintain a **risk and issues register** by logging any items as soon as they occur, and by reviewing and updating the document on a regular (e.g. weekly) basis

**DELIVER AND MEASURE**

1. Start from the **Change management strategy** to familiarise yourself with the key principles and techniques of change management and decide which ones to apply to the management of your organisation’s transition to Street Manager.
2. If you have completed the **Impact, Readiness and Stakeholder analyses** (part of the Playbook part 1 ([Link here](https://departmentfortransport.github.io/street-manager-docs/business-change/#documentation)**)** use the outcomes of those analyses to establish the current state of your stakeholder environment as well as any associated risks and opportunities. If you have not completed these analyses, you might find it helpful to look at them in conjunction with the Change management strategy
3. Read through the **Communications approach** and **Training approach** for best practice on communications and training delivery as well as a list of recommended activities and techniques
4. Use the **Engagement and Training needs assessment and progress tracker** to record, assess and track progress by stakeholder and type of activity. Treat this as a live document and update as needed (*optional if you want to assess and track at a more detailed level*)
5. Use the **Progress of Benefits tracker** to identify, categorise, plan and monitor benefits realised from your adoption of Street Manager. Treat this as a live document and update as needed.
6. Make sure that you maintain a **risk and issues register** by logging any items as soon as they occur, and by reviewing and updating the document on a regular (e.g. weekly) basis
7. Complete the **readiness assessment** before go-live as a final checklist