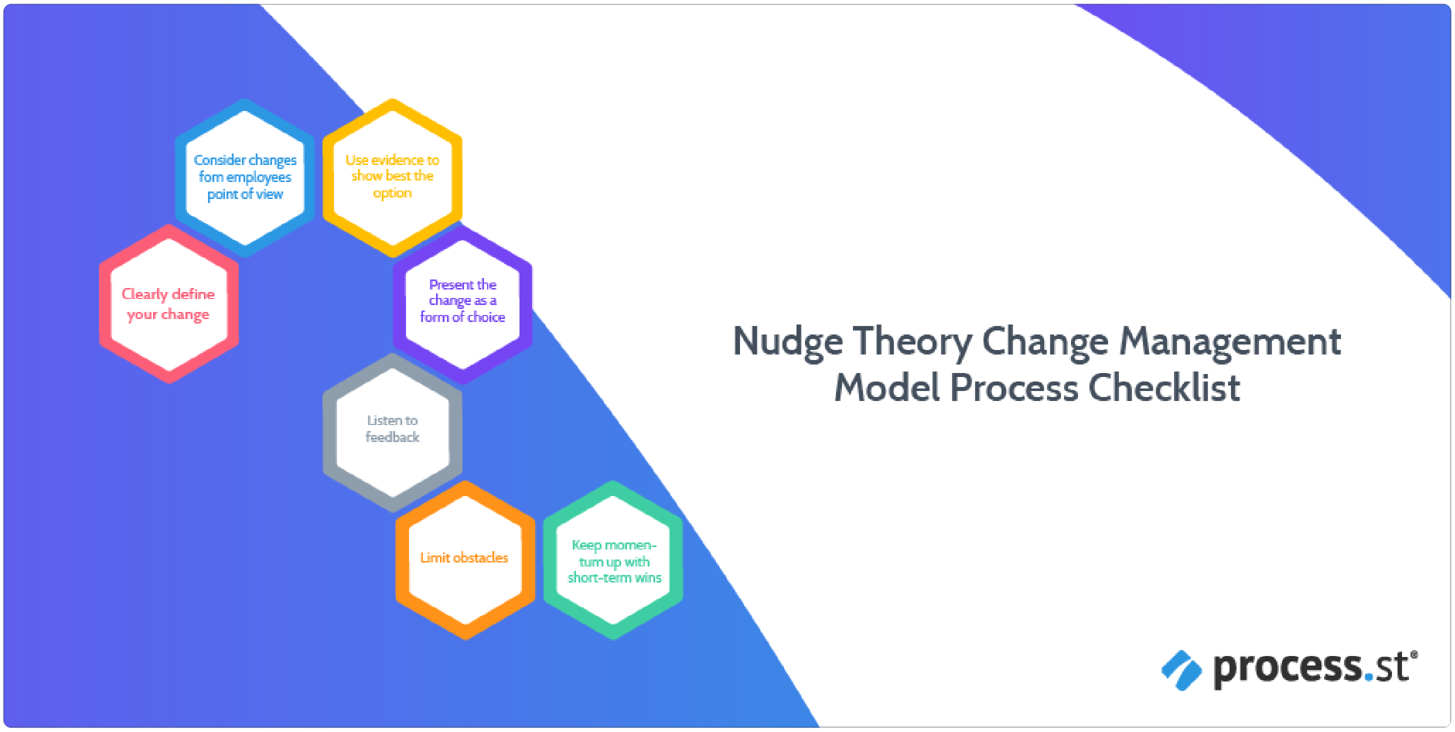
Introduction:



Nudge Theory Change Management Model Process Checklist frames change more attractively. It is more of a theory that a change management model.

Nudge Theory Change Management Model: An introduction

The Nudge theory is a behavioral science concept developed by Richard Thaler and Cass Sunstein in the 2008 book *Nudge: Improving Decisions About Health, Wealth, and Happiness.*

The basis of the theory is that nudging change along is much more effective than trying to enforce it in a traditional sense. Rather than telling your employees *what to do,* the choice landscape is designed so that employees are *choosing* the needed change themselves.

This changing the choice landscape is known as *nudging.* The trick with Nudge Theory is knowing how to present these nudges.

The core aspects of nudges are ascertained as being:

- Indirect
- Subtle
- Open-ended
- Educational
- Backed up with evidence
- Optional
- Open to discussion

There is no set method to *Nudge theory* so in that sense the theory is vague. It is better to think of nudge theory as a tool to use with another, more structured change management model.

This checklist will follow the basic principles of nudge theory, so your team are *nudged* to choose your proposed changes:

1. Clearly define your changes
2. Consider changes from your employees point of view
3. Use evidence to show the best options
4. Present the change as a choice
5. Listen to feedback
6. Limit obstacles
7. Keep the momentum up with short-term wins

What's good about it

Nudge theory helps the employee realize the importance of the issue and lets them choose the solution. This gives the employee choice, strengthening employee bonds with yourself and the business, leading to greater loyalty and lower employee turnover.

Nudge theory can be a great supplement to change management models that neglect the employee side to change. The theory looks at change from an employee perspective.

What's bad about it

As already mentioned, the nudge theory doesn't provide a model for analyzing, managing, deploying, and maintaining change and so it is best used as a supplement to another change management model. Because of this, implementing the nudge theory alongside another change management model is time and energy-consuming.

Nudge theory also suffers in terms of its predictability. Changing the landscape in favor of the employee to make a choice does not guarantee that the choice you want to be made is made.

How to use this checklist

At the beginning of this checklist, you will be **presented with a set of specialized questions** given as form fields. You are required to populate each form field with your data.

The checklist is broken down into the 7 stages of the Nudge Theory Change Management Model:

- **Stage 1 -** Clearly define your changes
- **Stage 2 -** Consider the changes from your employee point of view
- **Stage 3 -** Use evidence to show the best options
- **Stage 4 -** Present the changes as a choice
- **Stage 5 -** Listen to feedback
- **Stage 6 -** Limit obstacles
- **Stage 7 -** Keep the momentum up with short-term wins

At the end of each stage, your supervisor/manager will review your work **using Process Street's approvals feature**. Other features used in this template include:

- Stop tasks - To ensure task order.
- Dynamic due dates - To make sure your initiative is reviewed on time.
- Role assignment - To delegate tasks within your team ensuring your supervisors is appropriately assigned to the review tasks.
- Approvals - Tasks can be accepted, rejected, and rejected with comments.

Record checklist details

In this Nudge Theory Change Management Model Process Checklist, you will be presented with the following **form fields** for which you are required to **populate** with your **specific data**. More information for each form field type is provided via linkage to our help pages:

- Subtasks
- Long text
- Short text
- Date
- Approvals
- Website form field
- File upload form field

Let's start by recording your business details, your details, and the details of your supervisor or manager.

This is a stop task, meaning you cannot progress in this template until the required form fields are populated.

Business details

Business name

Something will be typed here...

Your details

Your full name

Something will be typed here...

Details of Manager/Supervisor

Manager's name

Something will be typed here...

Checklist details

Once set, the due dates for each phase in this Lewin's Change Management Model Process Checklist will be used to set a dynamic due date, **notifying your manager for the needed stage approval when required.**

Checklist start date

Date will be set here

Stage 1 due date

Date will be set here

Stage 2 due date

Date will be set here

Stage 3 due date

Date will be set here

Stage 4 due date

Date will be set here

Stage 5 due date

Date will be set here

Stage 6 due date

Date will be set here

Stage 7 due date

Date will be set here

Overview change details

To begin this Nudge Theory Change Management Model Process Checklist, take the time to **give a summary overview of the changes** you intend to implement and explain why you want to implement these changes.

Next, **consider potential roadblocks** you could encounter during the implementation of change. **Summarize how you intend to remove these roadblocks**.

Use the long-text form fields to detail this information

Changes to implement

Something will be typed here...

Why change is important

Something will be typed here...

Potential roadblocks

Something will be typed here...

Strategy to remove potential roadblocks

Something will be typed here...

Stage 1 - Clearly define your changes:

Define your changes to be deployed

The goal of the nudge theory is not simply to deploy the required changes but to do so with the **full support of your employees**. Your employees need to know exactly what they are signing up for.

Use the long-text form field to clearly define your changes to be deployed.

Changes to be deployed

Something will be typed here...

Approval: Stage 1

Will be submitted for approval:

Define your changes to be deployed

Will be submitted

Stage 2 - Consider the changes from your employees' point of view:

Assess your team

"A nudge is any aspect of the choice architecture that alters behavior in a predictable way without forbidding any options or significantly changing their economic incentives. A nudge must be easy and cheap to avoid."
- Thaler and Sunstein, Nudge (2008)

Once you have set out **what changes you want to make**, you need to consider **how these changes will appear** from your employee's point of view. For this you need to consider:

- Your team's culture
- Your team's structure
- Your team's responsibilities
- Your team's skills

Use the long-text form fields below to detail this information.

Your team's culture

Something will be typed here...

Your team's structure

Something will be typed here...

Your team's responsibilities

Something will be typed here...

Your team's skills

Something will be typed here...

Detail how the change is desirable to your team

Think about how the changes to be achieved **are desirable to your workforce**.

Use the **long-text form field** below to detail this.

How is the change desirable?

Something will be typed here...

Approval: Stage 2

Will be submitted for approval:

Assess your team

Will be submitted

Detail how the change is desirable to your team

Will be submitted

Stage 3 - Use evidence to show the best option:

Assess current performance and structure

Once you know how to present the change to fit the priorities of your team, **you need to gather evidence to prove how this could be useful**.

The first step to gathering this evidence is to obtain information on current performance and structure.

Use the long-text form field below to detail this information.

Current performance

Something will be typed here...

Current structure

Something will be typed here...

Do not cherry-pick evidence that supports your theory, ignoring contradictory evidence.

Predict change effects

You then need to **predict the effects of change**. Use the long-text form field to detail these predictions.

Predicted impacts of change

Something will be typed here...

Compare current performance with predictions

Next, **compare your current performance with the predicted effects of change**. It is this difference that will be presented to your teams.

Use the l**ong-text form field below to detail the results of your comparisons made**.

Performance vs change

Something will be typed here...

Set up a meeting with your team to present this comparison.

Assign a meeting date. This will utilize our dynamic due date feature, notifying you a day before the meeting.

You can use our **members form field** to select the team members to attend the meeting. These team members will be notified.

Stage 3 - meeting date

Date will be set here

Run stage 3 meeting

It is now time to run the stage 3 meeting. Use this meeting to communicate the difference between actual performance and predicted performance from the changes made.

This is a stop task, meaning you cannot move forward in this template until the meeting has been conducted.

Approval: Stage 3

Will be submitted for approval:

Assess current performance and structure

Will be submitted

Predict change effects

Will be submitted

Compare current performance with predictions

Will be submitted

Run stage 3 meeting

Will be submitted

Stage 4 - Present the change as a choice:

Question whether the change has been chosen by your team

Despite the evidence gathered, as the Nudge theory goes, the evidence cannot be forced on your team. Doing so will only breed resentment.

Select **yes** or **no** from the drop-down form field provided in response to the given question. The question asks whether the change has been accepted and therefore chosen by your team.

If you have argued your case well, backing it up with evidence, then you should be able to respond *yes* to this question.

Is the change chosen by your team?

An option will be selected here

Identify why change has not been chosen

There could be several reasons as to why your implemented changes have not been chosen by your team, such as:

1. Did you miss anything when presenting the evidence to your team?
2. Have you argued your case well enough?

Listening to your team's feedback is a great way to decipher why your proposed changes were rejected. Listening to feedback is the next stage of this checklist.

Approval: Stage 4

Will be submitted for approval:

> Question whether the change has been chosen by your team
>
> *Will be submitted*

> Identify why change has not been chosen
>
> *Will be submitted*

Stage 5 - Listen to feedback:

Plan stage 5 meeting

Whether your changes have been accepted or not, **you need to listen to the feedback your team has**. By doing so you can:

- Identify *why* your changes were rejected if they have been rejected
- Reveal missed outside factors not yet considered
- Show your team they are valued as people and their opinion matters

To gather this feedback, set up a meeting with your employees. You can use our date form field to set a date for this meeting, and our members form field to assign team members to attend.

Stage 5 meeting date

Date will be set here

Run stage 5 meeting

It is now time to run the stage 5 meeting. Use this meeting to gather feedback from your team.

This is a stop task, meaning you cannot move forward in this template until the meeting has been conducted.

Make sure to document your feedback.

Document feedback

During the meeting, **you should have documented the feedback given.**

You can use the file upload form field to attach the documented feedback into this checklist. Alternatively, you may have documented feedback into online documentation. Use the website form field to add the URL of online documentation used.

Feedback given

File will be uploaded here

Approval: Stage 5

Will be submitted for approval:

Plan stage 5 meeting

Will be submitted

Run stage 5 meeting

Will be submitted

Document feedback

Will be submitted

Stage 6 - Limit obstacles:

Set up a stage 6 meeting

Before and during the deployment of the changes, **you should be limiting or removing obstacles**. You don't want to hit a roadblock during your change process, as this will set precedence for the enthusiasm for your change to come plummeting down.

You need to **take the time to assess what might get in the way of the change** and tackle those issues as soon as possible.

A great way to identify potential obstacles is to talk to your team. Set up a stage 6 meeting. Assign a meeting date and select the members to attend this meeting.

Stage 6 meeting date

Date will be set here

Run stage 6 meeting

It is now time to run the stage 6 meeting. Use this meeting to identify potential roadblocks that could affect the change implemented.

This is a stop task, meaning you cannot move forward in this template until the meeting has been conducted.

Make sure to document the obstacles identified from your meeting.

Document obstacles identified

During the meeting, **you should have documented the obstacles identified.**

You can use the file upload form field to attach the documented feedback into this checklist. Alternatively, you may have documented feedback into online documentation. Use the website form field to add the URL of online documentation used.

Obstacles identified

File will be uploaded here

Obstacles identified

File will be uploaded here

Limit identified obstacles

Once you have identified potential obstacles to your change process, **develop a strategy that will alleviate/limit these obstacles**.

Approval: Stage 6

Will be submitted for approval:

Set up a stage 6 meeting

Will be submitted

Run stage 6 meeting

Will be submitted

Document obstacles identified

Will be submitted

Limit identified obstacles

Will be submitted

Stage 7 - Keep the momentum up with short-term wins :

Document short-term goals

Once some progress has been made on the deployment of your changes, you need to **ensure that these changes are maintained**.

For this, **plan out short-term goals and milestones** which you can celebrate on reaching. Use the long-text form field below to plan out short-term, goals.

Short-term goals

Something will be typed here...

Keep updating the short-term goals to maintain momentum until the changes set are as a normal routine.

Approval: Stage 7

Will be submitted for approval:

> Document short-term goals
>
> *Will be submitted*

Sources:

- Nudge: Improving Decisions About Health, Wealth and Happiness - Richard H Thaler and Cass R Sunstein
- Process Street - 8 Critical Change Management Models to Evolve and Survive
- Image - Qimono, re-sized
- Image - Free-Photos, re-sized
- Image - 422737-422737, re-sized
- Image - Qimono, re-sized
- Image - Geralt, re-sized
- Image - Maryam62, re-sized
- Image - tortugadatacorp, re-sized

Related checklist:

- ADKAR Model Change Management Process Checklist
- Bridges Transition Model Process Checklist
- Kotter’s Change Management Model Process Checklist
- Kubler-Ross Change Curve Process Checklist
- Lewin's Change Management Model Process Checklist
- McKinsey 7-S Model Checklist Process
- PDCA Cycle Change Management Model Process Checklist
- Satir Change Management Model Process Checklist
- 5 Whys Checklist Template
- Project Management Process
- VRIO Analysis Checklist
- Risk Management Process
- How to Respond to Negative Reviews
- Business Needs Assessment Template
- Employee Satisfaction Survey
- Financial Audit Checklist
- Financial Planning Process
- Gap Analysis Template
- Google Analytics Audit
- How to Ask for a Review from a High Touch Client Checklist
- Application Security Audit Checklist Template
- Environmental Accounting Internal Audit
- Financial Audit Checklist
- Firewall Audit Checklist
- Fleet Management Internal Audit Checklist
- Google Analytics Audit
- ISA Audit Checklist
- PPC Audit Checklist

- Technical SEO Audit