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# PERSONAL CHANGE ROADMAP WORKSHEET

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## Section 1: Self-Assessment

Reflect on the key change management themes presented (e.g., Strategic Prioritization, Cross-Department Collaboration, Training and Support, Data Integrity, Tools & Customization, Continuous Improvement).

### Guiding Questions

#### Familiarity Check

- How familiar are you with each of these change management themes?
- Which themes do you feel most comfortable with? Which ones are new or challenging to you?

#### Rating Your Preparedness

For each theme, rate your current level of comfort and preparedness on a scale from 1 (not comfortable) to 5 (very comfortable).

Strategic Prioritization and Planning: \_\_\_\_\_

Cross-Department Collaboration: \_\_\_\_\_

Training and Support Infrastructure: \_\_\_\_\_

Data Integrity and Testing: \_\_\_\_\_

Tools and Customization: \_\_\_\_\_

Continuous Improvement and Flexibility: \_\_\_\_\_

#### Overall Readiness

- What is your overall sense of preparedness for the CRM transition?
- Is there one area that stands out as needing immediate focus?

## Section 2: Identifying Personal Strengths and Challenges

### Guiding Questions

#### Strengths

List at least two personal strengths or past experiences that will help you navigate this CRM transition or project successfully.

- Example: "I have strong analytical skills that will help me understand new dashboard metrics."

- Strength 1: \_\_\_\_\_
- Strength 2: \_\_\_\_\_

## Challenges

Identify two potential challenges or areas where you feel less prepared during this transition.

Example: "I struggle with learning new software interfaces quickly."

Challenge 1: \_\_\_\_\_

Challenge 2: \_\_\_\_\_

## Section 3: Developing Your Personal Action Plan

### Guiding Questions

#### Goal Setting

Based on your self-assessment, which one or two areas do you want to improve first?

Area 1: \_\_\_\_\_

Area 2 (optional): \_\_\_\_\_

#### Action Steps

For each chosen area, outline three actionable steps you can take.

##### **For Area 1:**

Action Step 1: \_\_\_\_\_

Action Step 2: \_\_\_\_\_

Action Step 3: \_\_\_\_\_

##### **For Area 2 (if applicable):**

Action Step 1: \_\_\_\_\_

Action Step 2: \_\_\_\_\_

Action Step 3: \_\_\_\_\_

#### Timeline

What are the realistic deadlines for each action step?

For example, "Complete training module by the end of the week."

Action Step 1 Deadline: \_\_\_\_\_

Action Step 2 Deadline: \_\_\_\_\_

Action Step 3 Deadline: \_\_\_\_\_

## Section 4: Reflecting on Continuous Improvement

### Guiding Questions

#### Monitoring Progress

- How will you monitor your progress on your personal action plan?
- What specific indicators or milestones will tell you that you are making progress?

#### Feedback and Adjustments

- How will you gather feedback on your progress?
- What steps will you take if you find that your initial plan isn't working as expected?

#### Future Considerations

- What additional support or resources do you need to ensure ongoing success during the CRM transition?
- Are there any questions or topics you want to discuss further with your supervisor or team lead?

## Final Reflection

#### Personal Commitment

Write a short statement (2-3 sentences) summarizing your commitment to your personal development during this transition.

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This digital worksheet is designed to help you reflect, plan, and take actionable steps to ensure a smooth and successful transition. Use your responses to guide your next steps and to discuss any needs or insights with your team or supervisor. Enjoy the process of growing your skills and confidence during this period of change!