

THE FIELD-FIRST CHANGE MANAGEMENT WORKSHEET

With Thaddeus Tsohantaridis

Introduction

Rolling out digital tools in heavy industry, field ops, or construction isn't just about features, it's about humans. This worksheet helps L&D, Ops, and Enablement leaders plan and execute a change management process rooted in empathy, field validation, and practical workflows.

Use this guide to:

- ✓ Build trust with frontline workers
- ✓ Align field data with leadership goals
- ✓ Accelerate adoption through human-centered training

How to Use This Guide

This is a field-tested planning document designed for active rollout planning—not a theoretical model.

Use it to:

- Plan Your Approach – Think through change before launching tools.
- Run Workshops – Bring together ops, L&D, and frontline reps to co-create adoption plans.
- Guide Field Visits – Take this worksheet on ride-alongs to gather real data.
- Measure & Adjust – Treat it as a living document—revisit and revise it quarterly.

Tips:

- Print it out or digitize for collaborative note-taking.
- Work one tech/process at a time (e.g., inspections, ERP logging, digital time tracking).
- Involve multiple roles early—operators, supervisors, techs, and leadership.

Step 1: UNDERSTAND CURRENT WORKFLOWS (DO A RIDE-ALONG)

Goal:

Observe how work gets done today — on the floor, in the field, or in the cab.

Actions:

- Shadow operators, techs, or shift leads during real workflows.
- Ask: “What’s a pain in your day?” “Where do you wish things were easier?”
- Time basic processes (e.g., filling out paper logs, doing inspections).

Template:

Workflow Task	Tools Used Today	Time Taken	Frustration Level	Notes

Step 2: SURFACE & TRANSLATE THE “WHY”

Goal:

Bridge the gap between what leadership wants and what field teams care about.

Actions:

- Write the “Why” from both leadership and field perspectives.
- Test it with a frontline worker. Does it resonate?
- Show how digital tools protect, empower, or improve their day (e.g., better equipment access, CYA evidence, faster maintenance).

Template:

Tool/Process	Leadership’s Why	Field-Focused Why
Dash Cam	Improve safety metrics	Helps prove you weren’t at fault
ERP Log	Track maintenance ROI	Your part orders won't get lost anymore

Step 3: INVOLVE THE EXPERTS EARLY

Goal:

Turn field pros into allies by involving them in solution design.

Actions:

- Identify respected veterans and shift leads (formal or informal).
- Ask: “If you were training a new guy, what would you teach first?”
- Invite them to pilot sessions or feedback walkthroughs.

Checklist:

<input type="checkbox"/>	Have I interviewed at least 3 field SMEs?
<input type="checkbox"/>	Did I demo the new tool to them for feedback?
<input type="checkbox"/>	Did I adjust based on what they said?

Step 4: TEST IN A LOW-STRESS ENVIRONMENT

Goal:

Let people learn without production pressure.

Actions:

- Create a simulated training environment (e.g., non-live system or test yard).
- Let them use the actual tools (tablets, ERP) in a safe sandbox.
- Give ownership (e.g., “this is your tablet now”).

Tip: Do not schedule this during shift turnover or crunch time.

Step 5: BUILD PERSONA-BASED TRAINING PATHS

Goal:

Match training depth to each role’s real need and responsibility.

Matrix:

Role	What They Need to Know	Format	Who Trains Them
Operator	Pre-shift digital inspection	Hands-on + video	Site trainer
Supervisor	How to pull reports + enforce	Workshop	L&D partner

Step 6: CLOSE THE LOOP

Goal:

Show field teams that their input is seen and matters.

Actions:

- Share small wins back to teams (e.g., “We got approval for 2 more machines thanks to your data”).
- Spotlight high performers (“Mike helped improve this workflow”).
- Schedule regular feedback loops: “What should we fix next?”

FINAL CHECKLIST FOR FIELD-FIRST ROLLOUT

Action	Status
Field ride-alongs completed	<input type="checkbox"/>
“Why” translated for field	<input type="checkbox"/>
SME involvement in pilot	<input type="checkbox"/>
Low-pressure training site set up	<input type="checkbox"/>
Persona-based paths built	<input type="checkbox"/>
Wins looped back to field	<input type="checkbox"/>