

Client History and Remediation Technology (C.H.A.R.T.)

Note. A Client CHART is not necessarily always available, but when used it provides the client and *QWLC* with a concrete document to reinforce the understanding each has of the other and of the conditions and status of their relationship. The original Manual is delivered with a copy of the CHART as of the delivery Event. All those who have access to the Internet page assigned to each client organization may obtain changes to the CHART at any time. All client pages are password protected. Facilitators have the password as to members of the management team.

A. Overview.

In complex change initiatives, it is always beneficial to have a single source for engagement status. Those who interact with *QWLC* as an external change agent consultant may elect to have such a page on our Internet site. As agreements are reached, and as Event take place, results are posted to the client CHART so that everyone concerned will have a single source of information about the engagement. There are five major blocks of information posted to the CHART.

B. Scope.

Scope items define the parameters of the engagement. If anyone is interested in generally "what" is being done and "why", the scope paragraphs will address these questions.

C. Roles.

The Organization Change System defines certain roles that ought to be filled by qualified individuals in order for the effort to progress at an optimum rate and level of effectiveness and efficiency. These paragraphs define the roles and identify "who" fills them.

D. Remediation Technology.

There are wide ranges of potential technologies that can be brought to bear on an organization undergoing change. This section defines the broad remediation technology range that will be used to make improvements. The remediation technology addresses "how" change will take place - "what" will be used as the catalyst for change.

E. Diagnostic Results.

As measurements are made, the results are posted to assure that everyone is aware of shifts as they occur. As in a timeline, these paragraphs will describe "when" conditions exist and of "what" significance those measurements are to the direction the organization is headed. These data provide the grading system that allows users to know with certainty their status and progress.

F. Remediation Activity.

Remediation activity paragraphs help everyone understand "Where" the organization has been and "where" it is going. Events that have already taken place and are scheduled to occur are described so that potential (or agreed upon) next steps are always known (or at least available).

Summary

A common problem among change agents in complex organizations is that the left hand doesn't always know what the right hand is doing (or is going to do). The client CHART is designed to assist in this process. It can be the one place that allows participants to keep pace with what is happening on a variety of fronts that may not be readily apparent to everyone.