

Change Management: Verify Readiness Before the Switch

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Why this matters

A planned change has a transition period: people may have different instructions, equipment may be partly replaced and a control owner may be unclear. Prepare that period as carefully as the final arrangement. Before the switch, establish which conditions permit the next step and who has evidence that they are met.

Objective: Explain a planned change's transition, affected controls and release conditions, then verify readiness before relying on the new arrangement.

Key hazards or failure points

Old and new instructions mixed; affected crews omitted; protection removed too early; incomplete installation; unclear control ownership; training assumed; a successful first use mistaken for completed follow-up.

Practical controls

- Define what changes, when and who is affected, including other shifts and employers. Use the applicable change-approval process. Identify protection needed before, during and after the transition.
- Assign transition tasks, required checks and release decisions to the appropriate people. Resolve conflicting instructions and provide the required training, equipment and support before affected work begins.
- Agree hold points, communication and an approved contingency if readiness is not achieved. Keep required protection effective throughout the change. Do not assume returning to the previous arrangement is automatically safe.

Verify It in the Field

Walk through the transition on paper with affected roles. At each stage, identify the controlling instruction, required protection and responsible person. Record gaps where work could start before the new control is ready.

Before release, have designated people compare actual conditions with the governing procedure, design, permit or equipment criteria. Record required inspection results, verifier and time. A delivery, installation notice or training invitation is not completed readiness evidence.

Ask affected workers to explain the next authorized step, remaining restriction and stop contact. After implementation, check the arrangement at the planned review point for usability and control performance. Record actual findings and unresolved items; maintain necessary holds.

Stop and reassess

Hold the switch or affected work for missing approval, incompatible instructions, unverified protection or an uncovered transition stage. Use the defined safe-state and notification process. Resume only after required corrections, checks and authorization. Reassess unexpected effects; the original approval does not cover every later change.

Ask the crew

1. Where could protection be lost during this transition?
2. Who decides that the next stage is ready?
3. What evidence will we review after the switch?

Use the task plan and required specialist decisions before exposure.

Sources: DOE-HDBK-1028-2009, Vol. 2, pp. 93–94; HSE Organisational Change; OSHA Hazard Prevention.

Free next step: [JHA/JSA planning & field-verification worksheet](#)

Expanded guidance and separate forms: toddjeromejenkins.com/toolbox-talks/change-management-transition-readiness

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