

Tax Technology Change Readiness Assessment

Before you can lead meaningful change, you need to know where your team stands. This quick assessment helps tax leaders evaluate their team's mindset, trust level, and capacity for change. With a focus on emotional and cultural dynamics, not just systems, this tool gives you a pulse check on how ready your team is to adopt new tax technology and ways of working. Use the results to shape communication, pace, and support strategies that stick.

Google Form Title:

Tax Technology Change Readiness Check-In

Form Description:

We're gathering anonymous feedback to better understand how our team feels about upcoming changes to our tax technology and processes. Your honesty helps us lead this change more thoughtfully.

Questions (All required, 1–5 scale)

Use a Linear Scale for each (1 = Strongly Disagree, 5 = Strongly Agree)

1. I understand why this change is happening.
2. I feel comfortable voicing concerns about new systems or processes.
3. I believe this change will ultimately make my job easier or more efficient.
4. I trust that leadership is listening to feedback.
5. I have the time and support I need to adapt to change.
6. Previous change projects were well-managed.
7. I know who to go to with questions or issues about the new system.
8. I feel recognized for my contributions during change initiatives.
9. Communication about this change has been clear and timely.
10. I'm optimistic about the direction our team is heading.

Optional Open-Ended Questions

Add **Short Answer** or **Paragraph** questions:

- What's one part of this change that excites you?
- What's one thing that feels unclear or frustrating?



Scoring Guide (For Internal Use Only)

Total scores out of 50:

Score Range	Interpretation	Suggested Action
41–50	Ready & Engaged	Team is aligned, optimistic, and likely to adopt change well. Keep the momentum and let the team lead.
31–40	Cautiously Open	Some skepticism or resource concerns. Clarify support and reinforce the “why.”
21–30	Stressed & Skeptical	Fatigue or fear is high. Double down on listening and psychological safety. Prioritize empathy, feedback loops, and visible wins.
10–20	At Risk	Burnout or distrust may derail change. Pause, listen, and rebuild the connection and trust before moving forward.

