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# Transformation Project Assessment Checklist

For the Period: Start Date to End Date

Written by: Name Surname

Download Consultport’s “100-day Guide for Business Transformation Executives” to help you on how to use this template.

**Step 1: Set Goals.**

List your goals, including both business metrics and relationship objectives. For instance, a relationship objective might be to establish credibility and build trust with key stakeholders. A measurable goal for this could be to meet with site leaders and front-line employees at five different locations within the first 30 days.

| Goal | Metrics for success | Timeframe | How you’ll get there | Next actions |
| --- | --- | --- | --- | --- |
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**Step 2: Identify Stakeholders / Audiences.**

Identify the key stakeholders and audiences you need to engage with, understand, and build partnerships with both within your team and across the organization. Consider what you want them to know, feel, and do as you establish these relationships. Use this framework to organize your next steps.

| Key Stakeholders | Action or Mindset Needed | What They Need to Overcome | Key messages to send | Main Channels |
| --- | --- | --- | --- | --- |
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**Step 3: Quick Win Tactics**

Identify opportunities for quick, meaningful wins that demonstrate progress toward your overall goals. While it’s important for leaders to focus on long-term impact, celebrating small wins along the way provides tangible evidence of progress and helps stakeholders recognize the immediate impact of your actions.

| AUDIENCE (Insert) | AUDIENCE (Insert) | AUDIENCE (Insert) | AUDIENCE (Insert) |
| --- | --- | --- | --- |
| 1. TACTIC (insert)  • <Insert> | 1. TACTIC (insert)  • <Insert> | 1. TACTIC (insert)  • <Insert> | 1. TACTIC (insert)  • <Insert> |
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| 3. TACTIC (insert)  • <Insert> | 3. TACTIC (insert)  • <Insert> | 3. TACTIC (insert)  • <Insert> | 3. TACTIC (insert)  • <Insert> |

**Step 4: Your Checklist to Measure Success**

Evaluate your transformation project's progress and effectiveness by addressing: appropriate use of project management methods, understanding of processes, products, and technologies, managing complexity, handling uncertainty, and utilizing competent people. This checklist ensures that you address potential risks, maintain alignment with goals, and track your success throughout the transformation process.

**1. Appropriate Use of Methods**

| **Questions** | **Yes** | **No** |
| --- | --- | --- |
| Have the appropriate project management methodologies been chosen to detect early signs and risks of transformation failure? | [ ] | [ ] |
| Are project managers and sponsors fully dedicated to correctly implementing the project management methodologies throughout the transformation process? | [ ] | [ ] |
| Has project management effectively eliminated all obstacles to the proper application of these methodologies? | [ ] | [ ] |
| Have the project management methodologies been sufficiently mastered and tailored to match the complexity of the transformation effort? | [ ] | [ ] |

**2. Knowing Your Processes, Products, and Technologies**

| **Questions** | **Yes** | **No** |
| --- | --- | --- |
| Has a clear vision for the transformation been established, with outcomes defined in a detailed business case and benefits analysis? | [ ] | [ ] |
| Has a high-level target operating model been defined for processes, products, and technology, and aligned with the transformation vision? | [ ] | [ ] |
| Have appropriate vendors and technologies been thoroughly evaluated and chosen to support this transformation vision? | [ ] | [ ] |
| Have the high-level design requirements been set and the minimum viable product aligned with key stakeholder expectations? | [ ] | [ ] |

**3. Manage the Level of Complexity**

| **Questions** | **Yes** | **No** |
| --- | --- | --- |
| Is the level of complexity throughout the project life cycle clearly defined and understood? | [ ] | [ ] |
| Have the organizational and technological complexities been assessed based on the transformation's size, variety, interdependencies, and contextual factors? | [ ] | [ ] |
| Have processes and controls been adequately defined, formalized, and implemented to manage the identified complexity? | [ ] | [ ] |
| Have the interdependencies been clearly mapped and regularly monitored for cause and effect relationships? | [ ] | [ ] |

**4. Manage the Level of Uncertainty**

| **Questions** | **Yes** | **No** |
| --- | --- | --- |
| Have the potential negative impacts of complexity been evaluated, and has the level of uncertainty been defined concerning task duration, deliverable costs, and other key transformation dimensions? | [ ] | [ ] |
| Have contingency plans and alternatives been developed and pre-planned? | [ ] | [ ] |
| Have strategies been established to manage unknown unknowns and high uncertainty, such as parallel or sequential trials? | [ ] | [ ] |
| Have adequate buffers been incorporated into the budget and schedule to address unknown unknowns? | [ ] | [ ] |

**5. Utilize Competent People**

| **Questions** | **Yes** | **No** |
| --- | --- | --- |
| Has a capable and experienced leadership team been chosen to steer the transformation, with an emphasis on emotional intelligence? | [ ] | [ ] |
| Does the project team possess the right mix of skills and the appropriate number of personnel for the entire transformation life cycle? | [ ] | [ ] |
| Has a clear communication strategy been implemented from the outset to prevent conflicting narratives about the transformation's vision and goals? | [ ] | [ ] |
| Is the motivation of project team members being maintained at a high level? | [ ] | [ ] |
| Are all team members fully aware of the objectives and their individual roles? | [ ] | [ ] |

