Tool 39-2. A Readiness Checklist

Drivers and Motivation

- What are the drivers for this project? Are there business or organizational drivers to make this change?
- What is the client's motivation for this project? Does the client have positive energy and enthusiasm, or is the client's energy for the initiative flat, resistant, or negative?
- Is senior management pushing this initiative? If so, who?
- What does the client believe are the reasons?
- What are the potential outcomes anticipated by the client?
- Who is supportive, antagonistic, or apathetic toward the change?
- To what extent does this project support the business strategy or business goals that are deemed important?
- How did this need arise? How long has the client been aware of it? Have there been efforts to address it? What has worked or not worked?
- Who suggested using consulting assistance to address it?
- Are there other issues?

Environment for Change

- Where is the pressure for change in the client system?
- How much change has the organization experienced recently? What has been the impact?
- Will the organization's culture support the kinds of changes required by this project?
- Is there an openness to new ideas and learning in the culture of the organization?

Client-Consultant Relationship

- Have you established a partnership relationship with the client? Have you established credibility with the client? Do you have the client's trust?
- Have you worked with this client before? Has the client worked with other internal or external consultants?
- What is the client's perspective on these experiences? What have you learned from those experiences that you can draw on for this project?
- Do you and your client have a common understanding, use the same language, and share expectations for the results of this initiative?
- Are there other issues?

Client's Understanding and Skill in Managing Change

- What is the client's change leadership capacity? Do recent experiences inform you about the client's ability to implement the changes that will be required?
- Has the client demonstrated interest and ability to learn new ideas, knowledge, and skills, and how to use them advantageously?
- What is the client's experience with or knowledge about the specific issues that will be the focus of this initiative?
- Is the client open to feedback about his or her leadership and communication on the project? Is there a willingness to engage in self-reflection and learning?
- Are there other issues?

Commitment, Resources, and Attention

- What is the client's view of the energy, commitment, support, and attention that the project will require?
- Where does this issue rank on the client's priority list of issues demanding time and attention? Is it a top-priority issue or something that seems far down the list?
- At what level of involvement or responsibility is the client willing to participate? Is the client willing to do his or her part?
- Has commitment or participation been secured from members of the client system? Senior management? Other function areas?
- Is it clear what the budget will be? Does the client's view of appropriate costs match yours?
- Is the client willing to commit administrative or other support resources to the project?
- Are there any other issues?

Client Understanding of the Project

- Has the client identified outcomes or goals for this project? How will the client measure success?
- Does the client have a vision of the desired future for the organization?
- Does the client understand the potential impact of the initiative on the organization and the business?
- How does this project relate to other, ongoing change projects in the organization?
- What is to be the specific output or result of the project?
- Are there other issues?

Scope and Time Line

- What is the client's view of the scope of the project? Does the client want or understand the value of breaking it into small pieces?
- Does the client understand other systems and processes that will need to be changed to support this project?
- How soon does the client want concrete results?
- Are the timeframes expected by the client realistic?
- Are there other issues?

Source: Scott (2000).