A REFERENCE CHECKLIST

Transformation Readiness Checklist

Thirty questions to work through before you commit to a significant change effort.

J. Lynne & Co.

The patience to see it. The drive to move it.

HOW TO USE THIS

This checklist covers the period before a commitment is made — the months in which scope, ownership, data, and vendor terms are still open. It applies to a system replacement, but equally to a reorganization, a consolidation, or an outsourcing decision.

Mark each statement Yes, No, or Not sure, answering for the organization rather than for yourself. If something is believed to be true but could not be evidenced, that is a Not sure.

Many organizations have the sponsor, the steering committee, and the technology lead complete it separately and compare. Differences between the three sheets are usually more informative than the totals.

About the three columns

A No marks something known and not yet done. A Not sure marks something believed but not tested.

They lead to different next steps. A No can be assigned to someone. A Not sure usually needs someone to go and check first.

01 OWNERSHIP

Sponsorship and decision rights

STATEMENT	YES	NO	NOT SURE
A single named executive owns the outcome of this program.			
We have written down who can approve a change in scope, and at what size it needs a different approver.			
The people on our steering committee can commit their area without seeking permission elsewhere.			
There is an agreed route for resolving a disagreement between two areas within a set period.			
Our board knows what it will be asked to decide, and roughly when.			

02 PURPOSE

The case and the scope

STATEMENT	YES	NO	NOT SURE
We can state the outcome this program must produce in one sentence, without naming the software.			
The benefits in our business case have named owners who are accountable for delivering them after go-live.			
We have written down what is explicitly out of scope, not only what is in.			
We know which of our current processes we intend to change and which we intend to protect.			
Our timeline was built from the work required rather than backwards from a date.			

03 DATA

What we are moving

STATEMENT	YES	NO	NOT SURE
We know which system is the official record for each kind of information we rely on.			
Someone has looked at the real records in the systems we plan to move, not only at how those systems are set up.			
We have decided what history we are migrating and what we are archiving.			
Our data owners are named people in the business, not only in technology.			
We have budgeted time and people to clean the data up, not only to move it.			

04 PEOPLE

Ownership and capacity

STATEMENT	YES	NO	NOT SURE
Each core process has an owner in the business who can decide how it will work in the new system.			
The people we need for design and testing have been released from enough of their day jobs to do it.			
We know what else the organization is being asked to absorb during the same period.			
We have a plan for the roles and skills that change, not only for training people on screens.			
We know who will operate and improve the system after the implementation team leaves.			

05 VENDOR

Contract position

STATEMENT	YES	NO	NOT SURE
We evaluated the product against our requirements rather than against a demonstration.			
We have spoken with reference customers we found ourselves, at organizations of our size and complexity.			
Our contract ties payment to work we have formally accepted, not to time passing.			
We understand the total cost across the full term, including the increases in later years.			
We know what it would cost to leave, and our data exit rights are in writing.			

06 DELIVERY

Governance and reporting

STATEMENT	YES	NO	NOT SURE
We have an independent view of program status alongside the implementer’s reporting.			
Our reporting surfaces decisions and risks, not only percent complete.			
We have defined what “done” means at each phase, and who signs it.			
We have agreed the conditions under which we would pause, and who is able to call it.			
We know what we will measure in the two years after go-live, and who reports it.			

READING YOUR ANSWERS

Count the No and Not sure answers together, out of 30.

OPEN ITEMS	WHAT THAT USUALLY MEANS
0–4	**Few open items** Most of what this covers is settled. The remaining items are specific enough to assign individually.
5–10	**A common range** Most organizations completing this before a commitment land here. These are usually addressed in the weeks before signature, where they are least expensive.
11–18	**A wide spread** Enough is open that the items are likely to interact. A round of preparation before committing is common at this level.
19+	**Most items open**

OPEN ITEMS	WHAT THAT USUALLY MEANS
	The majority has not been settled yet. This is normal early on, and the list itself works as a starting agenda.

Where the answers cluster

A group of Not sure answers inside one section usually points to that area not yet having an owner, rather than to the work being behind.

Where the sponsor, the steering committee, and the technology lead produced noticeably different sheets, comparing them is normally the quickest next step.

ABOUT J. LYNNE & CO.

J. Lynne & Co. is an independent governance advisory firm working with organizations to lead major transformations with confidence. We take no vendor commissions and hold no reseller agreements.

We publish reference material of this kind for executives, boards, and program sponsors. If it is useful, you are welcome to adapt it for your own organization.

If you would like to talk

We are happy to answer questions about anything on this list, or to look at a decision you are close to making.

Website: jlynne.co

Book a conversation: jlynne.co/contact