



Helping you take your thinking forward

INPACT Strategic Review

SELF-ASSESSMENT CHECKLIST

This checklist is designed to enable you to assess your likelihood of bringing in an improvement project on time, within budget and delivering the expected benefits. It focuses on key aspects of the organisational culture and capability, the project and any external stakeholders.

Organisation

1. Management Culture, distrust factor and ownership of changes
2. Capability Maturity and visibility of process

Project

3. Clarity of objectives
4. Suitability of solution
5. Complexity of project and robustness of resource plan
6. Benefits Realisation

External Stakeholders

7. e.g. relationship with customers, suppliers

How to use the checklist

- Use the checklist when scoping a process or performance improvement project, or as a QA of an ongoing project to check that the project is likely to deliver the expected benefits.
- Tick the **Red/Amber/Green** boxes to record your own assessment of the status of the project.
- Then ask at least 3 other stakeholders/user representatives to do the same.
- If there is a preponderance of **Green** responses across all completed checklists, your project is likely to be successful.
- If there are several **Amber** or **Red** responses or there is significant variation between responses, you need to address the barriers or the project will not deliver as intended. Contact Imaginist to carry out a more in-depth INPACT assessment. This can be carried out in just 2-3 days to establish the barriers, quantify their impact and develop an action plan to address them.

Good luck!

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ORGANISATION			
1. Management Culture, distrust and ownership of change			
The culture of an organisation is an important influencer of success in implementing change			
▪ The organisation has a vision and set of objectives that everyone understands and shares	Red	Orange	Green
▪ The need for an open and sharing culture across departments and professional boundaries is understood and being achieved	Red	Orange	Green
▪ There is a low level of distrust between managers and staff, managers and executives, and between departments	Red	Orange	Green
▪ Staff are empowered to make decisions within well understood rules - the management style in the organisation does not have to be interventionist	Red	Orange	Green
▪ Compliance to policies is good	Red	Orange	Green
▪ Top managers are well known to staff and lead improvement project meetings	Red	Orange	Green
▪ Information flows freely and undistorted across the organisation as well as up and down the management hierarchy	Red	Orange	Green
▪ Ownership of change within user groups is a recognised pre-requisite to success and is being addressed in project plans	Red	Orange	Green
2. Capability maturity and visibility of process			
The capability maturity of an organisation is a measure of how well it manages its processes This indicates how well process changes and the adoption of new systems can be absorbed			
▪ Managers and staff have an end-to-end understanding of the processes they are carrying out and an awareness of the significance of the value they add	Red	Orange	Green
▪ Processes are well defined and consistently implemented across the organisation	Red	Orange	Green
▪ There are good performance measures in place	Red	Orange	Green
▪ There is sufficient training and support in place for managers and staff to adopt the new ways of working required by this project	Red	Orange	Green
PROJECT			
3. Clarity of objectives			
If stakeholders are unclear about the objectives of an improvement project, they will not give it priority			
▪ The project objectives, definition of business needs and statement of expected benefits are clearly set out and understood by all stakeholders	Red	Orange	Green
▪ The project supports and advances your business objectives	Red	Orange	Green
▪ The project is being driven by user representatives and not just by central Finance/IT/Procurement	Red	Orange	Green
▪ The project plan includes measures of success	Red	Orange	Green
▪ There is a project review process in place, which includes the option to stop the project	Red	Orange	Green

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4. Suitability of solution Selection of the right infrastructure/delivery system is critical to the successful delivery of benefits			
▪ The system or solution has been selected after thorough evaluation of all the options	Red	Orange	Green
▪ Attention has been paid to usability, functionality and supplier capability – all critical to delivery of benefits	Red	Orange	Green
▪ The system or solution is, as far as possible, 'off the shelf' and will not require bespoke maintenance	Red	Orange	Green
▪ The solution has been demonstrated and documented proof of performance has been provided	Red	Orange	Green
▪ The contract includes specification of any aspects of the system's performance not adequately covered by supplier's demonstration or documented evidence	Red	Orange	Green
▪ Sufficient time and resource has been allocated to any systems integration required	Red	Orange	Green
5. Complexity of project and robustness of resource plan An improvement project is rarely as simple and easy to roll out as anticipated - the risk is that insufficient project management time and skills are allocated			
▪ The complexity of the project has been assessed and plans reflect this	Red	Orange	Green
▪ The project will be implemented within 6 months or there is a phased roll-out programme	Red	Orange	Green
▪ The number of stakeholders and their requirements has been kept to a minimum and further requirements are not being added during implementation	Red	Orange	Green
▪ The scale of changes to processes and other systems has been recognised and factored into the perceived complexity of the project	Red	Orange	Green
▪ Sufficient project management time and skills have been allocated and there is planned capacity in the user departments to adopt the new ways of working and realise the benefits	Red	Orange	Green
6. Benefits Realisation Unless there is a clear plan for how benefits will be realised, the risk is that they will not happen			
▪ There is a benefits realisation plan with measurable improvement targets	Red	Orange	Green
▪ Budget holders in user departments are on the project board and are being held accountable for measurable performance improvements to core delivery targets, using the resources released as a result of the project	Red	Orange	Green
7. External Stakeholders External stakeholders are organisations or functions that are integral to the processes being changed but which lie outside the authority of the organisation implementing the change			
▪ All external stakeholders have been identified	Red	Orange	Green
▪ A communication plan is included in the project plans to gather/clean up relevant information (e.g. suppliers) and gain external stakeholder commitment	Red	Orange	Green
▪ Resources have been included in the project plan to support external stakeholders as they deal with the changes they need to make to their own processes	Red	Orange	Green
▪ The project has contingency plans and realistic benefit targets built in to allow for the failure of external stakeholders to adhere to promised timescales	Red	Orange	Green