

Primary Transformation Objective				Solution		Business Case		
						Critical Path Benefit	Direct ROI	
Stakeholders				Changes to BAU Process to Enable Solution		Top 3 Risks		
Name, Title	Role	Influence (L/M/H)	Support (L/M/H)			Adoption Risks		
						1.		
						2.		
						3.		
						Integration Risks		
						1.		
						2.		
				3.				
Roles: Exec Sponsor (ES), Sponsor (S), Functional Steward (FS), Business Steward (BS), Technical Champion (TC), Super-user (SU), Impacted User (IU)				Current Priorities	Key Dates		Value Risks	
					1 Start		1.	
					2 Alpha		2.	
					3 Beta		3.	
					4 BAU			
					5 Close			
Summary of my position today				Possible Actions		Best Next Actions		
<b>Strengths</b> <ul style="list-style-type: none"> <li>•</li> <li>•</li> <li>•</li> <li>•</li> </ul>				<ul style="list-style-type: none"> <li>•</li> <li>•</li> <li>•</li> <li>•</li> </ul>		Action	By when	
<b>Weaknesses</b> <ul style="list-style-type: none"> <li>•</li> <li>•</li> <li>•</li> <li>•</li> </ul>								



# How to Use the Transformation Worksheet

The Transformation Worksheet is a working tool. It is designed to support structured, assertive conversations about focus, risk, and priorities. It is not a status report, a governance artefact, or a document for wide circulation. Its value lies in how it sharpens thinking and enables better decisions.

The worksheet supports conversations that are outcome-led, realistic, and grounded in delivery. Used properly, it helps teams focus effort where it will actually move the primary transformation objective.

## The intent of the worksheet

The worksheet exists to answer three questions clearly:

1. **What is the Primary Transformation Objective we are trying to achieve?**
2. **Does this initiative materially benefit the capital project delivery critical path?**
3. **What are the next best actions to protect or unlock that outcome?**

If the worksheet does not help answer these questions, it is being misused.

## Stage 1: Preparation by the Change Leader

The Change Leader completes the worksheet before the discussion. This is a thinking exercise, not an arbitrary deliverable to be developed. The aim is clarity and honest, not completeness.

Top row: anchoring the initiative

- **Opportunity (Primary Transformation Objective)**  
State the single outcome that defines success for this initiative at this point in time. This must be singular and outcome-led. Other benefits may exist, but they are not the objective for this phase or are secondary to the primary objective.
- **Solution**  
Describe the solution as it will be integrated. This is what you believe will unlock the primary objective, not a fully committed design.
- **Business Case**  
Separate **Critical Path Benefit** from **Direct ROI**. Be explicit about how this intervention affects the *capital project delivery critical path*. If the benefit is indirect, note that clearly.

Middle section: focus and realism

- **Stakeholders**  
Populate this diagnostically. Focus on who is assuring the solution and who is assuring the benefit in practice, not who appears on an org chart.
- **BAU Changes Required**  
Describe what must change in day-to-day operations for the solution to work. If this is unclear, the initiative is not ready.

- **Current Priorities**  
What are you currently focussing your effort and attention on to deliver the transformation?
- **Key Dates**  
Capture upcoming gates or decisions that materially affect progress towards the primary objective.
- **Top 3 Risks**  
Identify the most significant risks to achieving the primary objective, across:
  1. **Adoption Risks**– what will prevent people from actually using the tool through choice or requirement?
  2. **Integration Risks** – what challenges are you facing in development, configuration, or migration?
  3. **Value Risks** – what could prevent the transformation from actually delivering the benefits or ROI?

*If a risk does not threaten the primary transformation objective, it should not dominate attention.*

Bottom section: judgement and options

- **Current Position**  
Be honest about strengths and weaknesses. This is reflection, not assessment.
- **Possible Actions**  
List all plausible actions without filtering.
- **Best Next Actions**  
Leave lightly sketched. Final agreement happens in the discussion.

## Stage 2: The Coach <> Change Leader Conversation

The worksheet structures a conversation between the change leader and their coach, perhaps a manager, mentor or sponsor. It is not worked through mechanically and is intended to provide a healthy conversation to agree the *next best actions*.

A useful flow is:

1. Confirm the Primary Transformation Objective.
2. Challenge whether the solution genuinely delivers a meaningful benefit to capital project delivery.
3. Test whether priorities are focused on what limits progress.
4. Explore risks honestly and early.
5. Discuss BAU readiness without softening discomfort.
6. Agree a small number of Best Next Actions.

The output of this is shared clarity and agreed actions, not a completed form or governance deliverable.