

TRANSFORMATION READINESS WORKSHEET

Andrea Shaikin's practical framework for managing complex change against a fixed deadline.

Introduction

Complex transformations rarely fail because people don't know what to do.

They fail because too many things have to happen in the right order—across teams, systems, partners, and processes—while everyone is working toward the same deadline.

Andrea Shaikin's approach is to make that complexity visible.

Instead of treating transformation as one giant project, break it into workstreams. Then work backward from the launch date to identify what each team needs, when they need it, and what has to happen first.

The goal isn't to make everything perfect before launch.

It's to know what must be ready, what can wait, and what needs to happen next.

Core principle: **Don't manage the deadline. Manage the readiness required to reach it.**

What You'll Build

By completing this worksheet, you'll identify:

- The critical outcome your transformation needs to achieve
- The teams and workstreams involved
- The dependencies between those workstreams
- What each team needs to become ready
- Which stakeholders need additional support
- What must be true on launch day
- What can move into hypercare
- Who owns the next action at every stage

Step 1: DEFINE THE CHANGE

Objective

Get everyone aligned on what is changing and what the deadline requires.

Question	Answer
What are we changing?	
Why does it need to happen?	
Hard launch date	
What happens if we miss it?	
Desired future state	

Launch Must-Haves

What must be true on launch day?

- ☐ _____
- ☐ _____
- ☐ _____
- ☐ _____

Everything else is a candidate for post-launch.

Step 2: BUILD YOUR WORKSTREAMS

Objective

Break the transformation into the teams and functions that actually have to change something.

Workstream	Owner	What Changes?	Key Dependency
Legal			
Operations			
Technology			

Workstream	Owner	What Changes?	Key Dependency
Data			
Marketing			
Enablement			
Other			

Checklist

- ☐ Every major function is represented
- ☐ Every workstream has an owner
- ☐ Owners have identified what they need
- ☐ Cross-functional dependencies are visible

Step 3: MAP THE DEPENDENCIES

Objective

Work backward from the launch outcome instead of simply assigning deadlines.

Pick One Critical Outcome

Launch outcome: _____

Now work backward:

What must be ready?	Who owns it?	What do they need first?	Ready By

Keep Asking:

- What do you need before you can do this?
- Who provides it?
- When do you need it?
- What happens if it's late?

Step 4: TRACK READINESS

Objective

Replace one giant deadline with smaller readiness milestones.

Readiness Tracker

Deliverable	Owner	Status	Blocker	Next Action
	Ready / At Risk / Blocked			
	Ready / At Risk / Blocked			
	Ready / At Risk / Blocked			
	Ready / At Risk / Blocked			

Weekly Check

- ☐ What's ready?
- ☐ What's blocked?
- ☐ What changed?
- ☐ Who needs something from another team?
- ☐ What decision is needed?

Step 5: ALIGN STAKEHOLDERS

Objective

Make the change workable for the people who actually have to implement it.

Stakeholder	What Changes for Them?	Their Constraint	Support We Can Provide

Before Handing Over a Task

- ☐ Do we understand their process?
- ☐ Do we understand their constraints?
- ☐ Can we simplify the request?
- ☐ Can we provide a template or example?
- ☐ Can we take part of the work off their plate?

Step 6: DECIDE: LAUNCH OR LATER?

Objective

Avoid trying to make everything perfect before launch.

Item	Launch-critical?	If not, move to	Owner
	☐ Yes ☐ No	☐ Hypercare ☐ Later	
	☐ Yes ☐ No	☐ Hypercare ☐ Later	
	☐ Yes ☐ No	☐ Hypercare ☐ Later	

Launch Checklist

- ☐ Critical requirements are ready
- ☐ Critical dependencies are complete
- ☐ Owners know what happens on launch day
- ☐ Deferred items are documented
- ☐ Hypercare owners are assigned

Step 7: PLAN HYPERCARE

Objective

Treat post-launch fixes as part of the plan—not as evidence that the project failed.

Issue	Owner	Priority	Action	Target Date
	High / Med / Low			
	High / Med / Low			
	High / Med / Low			

Hypercare Rules

- ☐ Capture issues in one place
- ☐ Assign an owner
- ☐ Prioritize them
- ☐ Fix what matters most
- ☐ Separate launch-critical issues from improvements
- ☐ Keep stakeholders updated

THE 5-MINUTE TRANSFORMATION CHECK

Before your next project meeting, answer:

Question	Answer
What absolutely must be true by launch?	
What is the biggest dependency?	
Who is currently blocked?	
What does that person/team need?	
What can we simplify?	
What can wait until after launch?	
Who owns the next action?	