PCT Assessment

Project Change Triangle Factors

Rank each factor on a 1–3 scale:

1 = Inadequate

2 = Adequate

3 = Exceptional

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| Leadership/Sponsorship Factor Assessment | 1–3 |
| 1. The change has a primary sponsor. | Choose an item. |
| 1. The primary sponsor has the necessary authority over the people, processes and systems to authorize and fund the change. | Choose an item. |
| 1. The primary sponsor is willing and able to build a sponsorship coalition for the change, and is able to manage resistance from other managers and supervisors. | Choose an item. |
| 1. The primary sponsor will actively and visibly participate with the project team throughout the entire project. | Choose an item. |
| 1. The primary sponsor will resolve issues and make decisions relating to the project schedule, scope and resources. | Choose an item. |
| 1. The primary sponsor can build awareness of the need for the change (why the change is happening) directly with employees. | Choose an item. |
| 1. The organization has a clearly defined vision and strategy. | Choose an item. |
| 1. This change is aligned with the strategy and vision for the organization. | Choose an item. |
| 1. Priorities have been set and communicated regarding this change and other competing initiatives. | Choose an item. |
| 1. The primary sponsor will visibly reinforce the change and celebrate successes with the team and the organization. | Choose an item. |
| Score (out of 30): 0 | |

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| Project Management Factor Assessment | 1–3 |
| 1. The change is clearly defined including what the change will look like and who is impacted by the change. | Choose an item. |
| 1. The project has a clearly defined scope. | Choose an item. |
| 1. The project has specific objectives that define success. | Choose an item. |
| 1. Project milestones have been identified and a project schedule has been created. | Choose an item. |
| 1. A project manager has been assigned to manage the project resources and tasks. | Choose an item. |
| 1. A work breakdown structure has been completed and deliverables have been identified. | Choose an item. |
| 1. Resources for the project team have been identified and acquired based on the work breakdown structure. | Choose an item. |
| 1. Periodic meetings are scheduled with the project team to track progress and resolve issues. | Choose an item. |
| 1. The primary sponsor is readily available to work on issues that impact dates, scope or resources. | Choose an item. |
| 1. The project plan has been integrated with the change management plan. | Choose an item. |
| Score (out of 30): 0 | |

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| Change Management Factor Assessment | 1–3 |
| 1. A structured change management approach is being applied to the project. | Choose an item. |
| 1. An assessment of the change and its impact on the organization has been completed. | Choose an item. |
| 1. An assessment of the organization’s readiness for change has been completed. | Choose an item. |
| 1. Anticipated areas of resistance have been identified and special tactics have been developed. | Choose an item. |
| 1. A change management strategy including the necessary sponsorship model and change management team model has been created. | Choose an item. |
| 1. Change management team members have been identified and trained. | Choose an item. |
| 1. An assessment of the strength of the sponsorship coalition has been conducted. | Choose an item. |
| 1. Change management plans including communications, sponsorship, coaching, training and resistance management plans have been created. | Choose an item. |
| 1. Feedback processes have been established to gather information from employees to determine how effectively the change is being adopted. | Choose an item. |
| 1. Resistance to change is managed effectively and change successes are celebrated, both in private and in public. | Choose an item. |
| Score (out of 30): 0 | |

Score interpretation: Scores of 19 or lower in any section of this assessment mean your project has potential threats and could be in jeopardy. Scores of 20 – 24 mean your project has some risk areas that need to be addressed. Scores of 25 – 30 mean your project is well positioned for success.

19 or lower  20 – 24  25 – 30