



Start Right Planning™ Assessment

Self-Assessment Questionnaire

This self-assessment helps business and IT leaders evaluate how effectively their organization plans for projects that meet stakeholder expectations, remain aligned with organizational priorities, and adapt as conditions change.

Rate each statement using the scale below. Add your scores in each category to see where you stand.

A higher score indicates planning disciplines that work together and remain active throughout the project lifecycle; a lower score exposes a lack of resource coordination that jeopardizes project success.

Rating Scale:

1: Rarely/never true | 2: Occasionally true | 3: Sometimes true | 4: Usually true | 5: Consistently true

1. Initiation Planning

- _____ The purpose, intended outcomes, and business value of the project are clearly articulated before work begins.
- _____ Success criteria are defined in business terms and validated with key stakeholders.
- _____ Roles, responsibilities, decision authority, and stakeholder ownership are established and revisited as needed.
- _____ Assumptions, constraints, resource needs, and Performance, Cost, and Schedule expectations are explicitly identified.
- _____ Stakeholders maintain a shared understanding of the project roadmap, objectives, and definition of success throughout execution.

Score: ____ / 25

Maturity Guide:

21–25 = Aligned Initiators: Projects start with a shared destination, clear ownership, and a practical roadmap.

16–20 = Structured Initiators: Most planning elements are in place, but some assumptions, roles, or success criteria may need refinement.

10–15 = Fragile Initiators: Planning occurs inconsistently, and stakeholder understanding may drift after kickoff.

<10 = Unanchored Initiators: Projects begin before direction, authority, and success criteria are clearly established.

2. Risk Planning

- _____ Risks are identified early and revisited regularly as project conditions change.
- _____ Material risks have owners, mitigation strategies, and practical response plans.
- _____ Risk probability and impact are assessed consistently, including implications for Performance, Cost, and Schedule.
- _____ Triggers, early warning indicators, and contingency actions are defined and monitored.
- _____ Risk implications are communicated clearly to affected stakeholders before surprises become crises.

Score: _____ / 25

Maturity Guide:

21–25 = Proactive Risk Planners: Risks are anticipated, owned, monitored, and communicated before they disrupt the project.

16–20 = Aware Risk Planners: Risks are generally visible, but ownership, triggers, or responses may not be fully integrated.

10–15 = Reactive Risk Planners: Risks are discussed, but mainly after they begin affecting delivery.

<10 = Crisis-Driven Planners: Risk planning is informal, incomplete, or activated only after problems occur.

3. Communication Planning

- _____ Stakeholders are identified and grouped based on interest, influence, role, and information needs.
- _____ A communication plan defines what information is shared, who receives it, how it is delivered, and when it is delivered.
- _____ Communication responsibilities are clearly assigned, including ownership for updates, decisions, and feedback loops.
- _____ Project changes, risks, decisions, and impacts are communicated proactively at the right level of detail for each audience.
- _____ Feedback mechanisms exist to confirm understanding, surface concerns, and keep expectations aligned throughout the project.

Score: ____ / 25

Maturity Guide:

21–25 = Engagement-Oriented Communicators: Communication is planned, targeted, two-way, and used to keep stakeholders aligned.

16–20 = Structured Communicators: Communication practices are defined but may not fully adapt to audience needs or changing conditions.

10–15 = Inconsistent Communicators: Communication happens, but timing, ownership, or content varies across stakeholders.

<10 = Informational Broadcasters: Communication is mostly one-way, generic, late, or disconnected from stakeholder expectations.

4. Adaptive Project Planning

- _____ Planning balances long-term direction with near-term clarity, so the team knows both the destination and the next steps.
- _____ Estimates, milestones, and dependencies are based on informed assumptions and refined as understanding improves.
- _____ The project plan is reviewed regularly and adjusted intentionally when conditions, priorities, or constraints change.
- _____ Planning artifacts, such as the roadmap, charter, work plan, or schedule, are current, accessible, and useful to the team.

_____ Stakeholders understand how changes or trade-offs affect Performance, Cost, and Schedule.

Score: ____ / 25

Maturity Guide:

21–25 = Adaptive Planners: Plans provide direction without becoming rigid, and adjustments are made deliberately as conditions evolve.

16–20 = Managed Portfolio: Plans are useful and maintained, though some dependencies or trade-offs may not be fully visible.

10–15 = Static Planners: Plans exist, but are not consistently updated, challenged, or used to guide decisions.

<10 = Hope-Based Planners: Projects rely more on effort, assumptions, and optimism than on active planning discipline.

5. Change Control Planning

_____ Change requests are documented and evaluated using clear, consistent criteria.

_____ Impacts to Performance, Cost, and Schedule are explicitly assessed before changes are approved.

_____ Decision authority for changes is understood, respected, and enforced.

_____ Approved changes are integrated into updated plans and communicated clearly to affected stakeholders.

_____ The cumulative impact of changes is monitored over time so small changes do not quietly reshape the project.

Score: ____ / 25

Maturity Guide:

21–25 = Disciplined Change Stewards: Change is evaluated, approved, integrated, and communicated as part of the project system.

16–20 = Controlled Change Managers: Most changes are managed, but cumulative impact or cross-plan effects may need more attention.

10–15 = Negotiated Change Handlers: Change decisions occur, but criteria, authority, or communication may be inconsistent.

<10 = Unbounded Change Acceptors: Changes are accepted informally, creating risk to expectations, delivery, and stakeholder trust.

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6. Change Management Planning

- _____ Organizational impacts of the project are identified early, including changes to roles, processes, behaviors, and expectations.
- _____ Stakeholder readiness is assessed and revisited as the project moves toward delivery and adoption.
- _____ Training, support, communication, and transition needs are planned and adjusted over time.
- _____ Resistance, confusion, or adoption risks are anticipated and addressed constructively before implementation.
- _____ Adoption, behavioral outcomes, and stakeholder satisfaction are monitored after implementation.

Score: ____ / 25

Maturity Guide:

21–25 = Adoption-Focused Planners: Change management begins early and supports real use, adoption, and value realization.

16–20 = Prepared Change Planners: Change impacts are understood, though readiness, training, or adoption measures may need strengthening.

10–15 = Late-Stage Change Planners: Change management is considered, but often too late to shape expectations or readiness effectively.

<10 = Assumption-Based Planners: The organization assumes people will adapt without sufficient planning, support, or reinforcement.

7. Solution Management Planning

- _____ Solution ownership and accountability are clearly defined before and after implementation.
- _____ Operational impacts, support responsibilities, and process changes are considered during planning.
- _____ Measures exist to evaluate whether the solution delivers the expected business value over time.
- _____ Feedback loops inform enhancements, adjustments, training, or process improvements after delivery.
- _____ The solution remains aligned with evolving organizational needs, not just the original implementation scope.

Score: ____ / 25

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Maturity Guide:

21–25 = Value-Sustaining Planners: Solution planning extends beyond go-live to ownership, adoption, measurement, and ongoing value.

16–20 = Solution-Aware Planners: Post-implementation needs are recognized, but measurement or feedback loops may be uneven.

10–15 = Delivery-Focused Planners: Planning focuses mainly on implementation, with limited attention to operations or value realization.

<10 = Install-and-Move-On Planners: The project is treated as complete at delivery, regardless of adoption, ownership, or value.

TOTAL SCORE (All Categories): _____ / 175

Overall Discovery Readiness Levels:

145–175 = Strategic Planning Performer: Planning is disciplined, integrated, adaptive, and focused on stakeholder value.

110–144 = Capable Planning Performer: The organization has a solid foundation, with targeted opportunities to strengthen alignment, integration, or adoption.

75–109 = Developing Planning Performer: Important planning practices exist, but project success may still depend too heavily on individual effort and informal coordination.

<75 = At-Risk Planning Performer: Projects are likely to miss expectations without stronger planning, communication, change control, and adoption support.

Interpretation & Next Steps

This assessment helps identify whether stronger planning discipline is needed before projects are started. Lower or uneven scores reflect a competitive environment where projects compete for scarce resources.

Our Start Right Planning™ engagements deliver practical, actionable results you can use immediately.

Ready to start? [Schedule a Conversation >](#)

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