

Foundation: People & Purpose

Organisation:

Assessor:

Date:

Leaders model psychological safety (blameless post-mortems, feedback rituals).

Clear decision rights and working agreements for cross-functional teams.

Communities of Practice are active with charters and regular rhythms.

Stakeholder trust maps maintained; external partner forums in place.

Change narrative and two-way communications plan for major initiatives.

Talent & Capability: role frameworks and academies (product, data, platform, AI).

Culture metrics tracked (eNPS, retention of critical roles, collaboration density).

Notes / Actions:

Direction: Experiences & Strategy

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End-to-end customer and employee journeys are mapped using Jobs-To-Be-Done.

Journey analytics track task success, drop-offs, first-contact resolution, and time-to-value.

Closed-loop Voice of Customer/Employee feeds directly into the portfolio backlog.

‘Moments that matter’ are defined with SLAs/SLOs and real-time alerts.

Experience OKRs are set and reviewed quarterly.

Scenario planning is maintained with explicit triggers and pre-agreed responses.

OKRs cascade to value streams and product teams; owners are clear.

Quarterly portfolio rebalancing occurs with capacity-based funding limits.

Hypothesis-driven business cases; experiments precede scale decisions.

Portfolio WIP limits are visualised on Kanban; explicit kill/scale criteria exist.

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Named end-to-end process owners per value stream; RACI is used and understood.

Process mining quantifies bottlenecks, rework, and dwell time.

A standard work library (BPMN/SOPs) exists with versioning and adoption metrics.

Automation heatmap and triage are used; pipeline is prioritised by ROI and risk.

Capacity simulation or a Digital Twin is used for scenario planning.

Cost-to-serve is visible at product/process level.

Data products have named owners, SLAs, and documentation.

Data contracts and lineage are in place; data quality scorecards are automated.

Governed self-service analytics with role-based access controls.

Privacy-by-design; differential access for sensitive data.

Experimentation platform supports A/B tests and causal inference methods.

Time-to-decision and data adoption metrics are tracked by domain.

A platform team provides 'paved roads': identity, CI/CD, logging, and observability.

API-first and event-driven integration patterns; versioning and deprecation policy exist.

DevOps/SRE practices with SLOs, error budgets, and runbooks.

FinOps and GreenOps: unit economics and sustainability are visible to teams.

Automation roadmap evolves from RPA to APIs to intelligent automation/agents with guardrails.

AI/GenAI is in production with LLMOps (registry, evaluations, safety, monitoring).

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Policy-as-code controls run in CI/CD; exceptions are tracked and reviewed.

AI and Data governance (risk, bias, robustness) with human-in-the-loop checkpoints.

Cyber posture: tabletop exercises, drills, and third-party risk management.

Privacy operations (data subject requests and retention) with SLA adherence.

Sustainability metrics embedded (e.g., CO₂e per transaction/workload).

Governance forums have lead-time SLAs; decisions are logged and auditable.

A product operating model empowers cross-functional teams.

Flow/DORA metrics are tracked: lead time, deployment frequency, MTTR, and change fail rate.

Outcome-based roadmaps with discovery → alpha → beta → scale stages.

Stage-gates are based on learning evidence rather than documents.

Adoption plans are tied to usage telemetry and behaviour change.

A benefits register has owners, baselines, and realisation reviews.

A live portfolio dashboard integrates OKRs, spend, flow, and benefits.

Notes / Actions:

Scoring (optional):

Use percentage completion per block (e.g., number of checkboxes ticked ÷ total).

Foundation score (%):

Direction score (%):

System score (%):

Delivery score (%):

Overall priorities and next steps: