

Project Management Office (PMO) Readiness & Risk Assessment

This assessment evaluates the Project Delivery Readiness of SMBs investing in growth-related initiatives. It helps identify operational risks and assesses how effectively the business can execute projects and maximize the impact of capital investments

Sec 1: Strategic Clarity

Are the strategic objectives driving this initiative clearly defined and measurable? (0-10 points)

- ☐ No objectives defined (0)
- ☐ High-level goals only (3)
- ☐ Clear business objectives with some measurable KPIs (7)
- ☐ Our objectives are measurable, aligned, and tied to ROI (10)

Is this initiative part of a larger strategic plan? (0-10 points)

- ☐ No (0)
- ☐ Somewhat (5)
- ☐ Fully integrated in a current strategic roadmap (10)

Sec 2: Planning & Governance

Does the business have a formal project plan or timeline for the initiative? (0-10 points)

- ☐ No plan (0)
- ☐ Drafted timeline with rough milestones (5)
- ☐ Formalized schedule with resources, dependencies & budgets (10)

Who owns the project and how will decisions be made during execution? (0-10 points)

- ☐ No clear ownership (0)
- ☐ One person decides everything (3)

- ☐ Owner identified, some governance, no formal structure (5)
- ☐ Clear roles, escalation paths & governance cadence (10)

Sec 3: Resource Capacity

Does the organization have enough skilled internal staff or external partners to deliver the project? (0-10 points)

- ☐ Major gaps or unknown (0)
- ☐ Somewhat resourced (5)
- ☐ Fully resourced or plan in place to fill gaps (10)

Is resource availability tracked or prioritized across projects? (0-10 points)

- ☐ Not tracked (0)
- ☐ Some availability tracked manually (5)
- ☐ Managed centrally (10)

Sec 4: Execution Readiness

Has this organization successfully executed similar initiatives in the past? (0-10 points)

- ☐ Never (0)
- ☐ Yes, with mixed success (5)
- ☐ Yes, with documented success metrics (10)

Is there a system or process in place to track progress, risks, and costs? (0-10 points)

- ☐ No (0)
- ☐ Ad hoc tracking, spreadsheets or informal methods (5)
- ☐ Centralized tools and reporting (10)

Sec 5: Risk & Change Management

How does the company manage unexpected challenges or changes in scope / timeline? (0-10 points)

- ☐ Reactively only (0)
- ☐ Somewhat proactive (5)
- ☐ Uses structured change control or risk planning (10)

Sec 6: Post-Project Value Realization

**How will the business measure the impact or ROI on Projects after completion?
(0-10 points)**

- ☐ No measurement planned (0 pts)
- ☐ General KPIs tracked (4)
- ☐ Defined success metrics tied to some Projects (7)
- ☐ Defined success metrics tied to all Projects (10)

Scoring Summary

Score Range	Readiness Level	Lender Recommendation
0-30	High Risk	Recommend project oversight or advisory support
31-60	Moderate Risk	Conditional approval; suggest improved governance
61+	Execution Ready	Strong environment; minimal intervention needed