

Assessment Questionnaire

Client:
Contact/Title:
Date:

1. What is the perceived problem or 'pain'?

- a. Symptom
- b. Cause

2. Why is it a concern now?

3. How much time remains to fix? Why?

4. Analysis: Digging into the situation

- a. Plan – How good is this? Mission clarity, agreement, schedule, estimates, assumptions, issues, risks and adversity.
- b. People – The right ones? Capability, team, vendor, sponsor, stakeholders, culture, readiness for change. Operating agreement / unity.
- c. Progress/Traceability – Will we make it? Evidence that the plan, people, and deliverables are connected to the mission. Plan reflects work to be done. Status of risks and assumptions.
- d. Commitment vs. Capability – Identify any gaps.

5. Proposal – The Get Well Plan

- a. Findings & Recommendations
 - i. Symptom / Root Cause
 - ii. Underlying Reality / Resulting Reality
 - iii. Concept, Relationship, Execution
 - iv. Risks
- b. Solution Design
 - i. Strategy, tactics, methods, process
 - ii. Proposed Plan
 - iii. Schedule
 - iv. Process
- c. Validate: Commitment vs. Capability

6. Authorization Decision

- a. Who, When, Where, How Much

7. Execute the Plan



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