

TRANSFORMATION READINESS & BUDGET CHECKLIST

For Finance & Technology Leaders | Bridge Axis Partners

bap

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Transform with Confidence



Before committing to any transformation investment, ask yourself these questions. If you can't answer most of them — your organisation may not be ready. That gap is where programs stall, budgets blow out, and value is lost.

	1 BUDGET PLANNING & INVESTMENT	Yes	Partial	No
	Have you quantified the full cost of transformation — not just the software licence?	☐	☐	☐
	Does your budget include change management, training, integration and data migration?	☐	☐	☐
	Have you allocated a contingency of 10–15% for scope changes and risk?	☐	☐	☐
	Is there an approved funding envelope with executive sign-off?	☐	☐	☐
	2 GOVERNANCE & DECISION-MAKING	Yes	Partial	No
	Is there a named executive sponsor with authority and accountability?	☐	☐	☐
	Do you have a clear governance structure and decision-making framework?	☐	☐	☐
	Are your key stakeholders aligned on priorities, scope and expected outcomes?	☐	☐	☐
	Is there a process to escalate risks and resolve blockers quickly?	☐	☐	☐
	3 BUSINESS & STAKEHOLDER READINESS	Yes	Partial	No
	Has the business case been validated against current organisational priorities?	☐	☐	☐
	Do impacted business units understand what will change and when?	☐	☐	☐
	Are your processes documented and ready for redesign?	☐	☐	☐
	Have compliance and regulatory requirements been factored into scope?	☐	☐	☐
	4 PEOPLE, CHANGE & ADOPTION	Yes	Partial	No
	Is there a dedicated change management resource — internal or external?	☐	☐	☐
	Have you assessed the change impact on your people and culture?	☐	☐	☐
	Is backfill or temporary resourcing budgeted for key roles during delivery?	☐	☐	☐
	Do you have a plan for training, communication and adoption post go-live?	☐	☐	☐
	5 RESOURCE & CAPABILITY PLANNING	Yes	Partial	No
	Do you have the internal capability to manage this program effectively?	☐	☐	☐
	Have you identified gaps that require external advisory or specialist support?	☐	☐	☐
	Is your vendor selection process structured and independent?	☐	☐	☐
	Do you have capacity to run BAU while delivering transformation?	☐	☐	☐



If you answered **No** or **Partial** to more than a few of these questions, your organisation may not be ready to invest — yet.



Good technology doesn't guarantee a successful transformation.
Good preparation gives it the best chance of success.



Not sure where your organisation stands?

Book a complimentary 45-minute Transformation Readiness Strategy Call

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Saud Khan
FCCA | CPA | PMP | Prosci
Principal Consultant



0452 028 116



bridgeaxis.com.au



linkedin.com/in/saudkhan