

# Phase Success Indicator Checklist

## Transformation Roadmap — Step 3

*A companion resource from Agile Meets AI, Appendix D*

Each phase builds on the previous. Moving to the next phase before completing the current one creates fragile foundations. Use this checklist to validate readiness before proceeding.

### Phase 1: Cultural Foundation

**Timeframe:** Months 1-3 (varies by org size) | **Focus:** Psychological safety, transparency, alignment

#### ✓ Success Indicators

*Ready for the next phase when:*

- ☐ Psychological safety scores show measurable improvement
- ☐ Teams run regular retrospectives that drive real change
- ☐ Team members articulate how their work connects to company goals
- ☐ Failed experiments discussed openly without blame
- ☐ Anonymous feedback volume decreases (people feel safe speaking up)

#### ⚠ Red Flags

*Don't proceed if:*

- ☐ Retrospectives focus on blame
- ☐ Failed experiments have career consequences
- ☐ Team members self-censor in meetings
- ☐ Anonymous feedback reveals problems leadership denies

**Common Pitfalls:** Treating this as "soft skills" that can be skipped; leadership support without behavior change; moving to Phase 2 before the foundation is solid

### Phase 2: Team Empowerment

**Timeframe:** Months 3-6 (varies by org size) | **Focus:** Decision authority, reduced approvals, customer feedback

#### ✓ Success Indicators

*Ready for the next phase when:*

- ☐ Decision-making speed increases measurably
- ☐ Teams cite decision authority in real conversations
- ☐ Approval cycle time reduced by 30-50%
- ☐ Retrospective action items have 80%+ completion rate
- ☐ Every team has regular customer interaction
- ☐ Customer feedback visibly influences priorities

#### ⚠ Red Flags

*Don't proceed if:*

- ☐ Teams still seek approval for decisions they should own
- ☐ Leadership overrides team decisions regularly
- ☐ Customer feedback collected but ignored
- ☐ Teams are "empowered," but obstacles are not removed

**Common Pitfalls:** Saying "you're empowered" then overriding decisions; reducing approvals without addressing trust; customer feedback theater

### Phase 3: Operational Excellence

**Timeframe:** Months 6-12 (varies by org size) | **Focus:** Streamlined delivery, automation, continuous improvement

#### ✓ Success Indicators

*Ready for the next phase when:*

- ☐ Deployment frequency increases significantly
- ☐ Change failure rate stays stable or decreases
- ☐ Teams report moving at a sustainable pace
- ☐ Successful practices spread across teams organically
- ☐ Work flows smoothly with minimal wait time

#### ⚠ Red Flags

*Don't proceed if:*

- ☐ Automation creates new bottlenecks
- ☐ Local optimization hurts overall flow
- ☐ Process improvements increase burden
- ☐ Practices scaled without adapting to context

**Common Pitfalls:** Automating for automation's sake; optimizing locally at the expense of overall flow; scaling without adaptation

### Phase 4: Continuous Evolution

**Timeframe:** Ongoing | **Focus:** Self-sustaining improvement, leadership development, cross-team learning

#### ✓ Success Indicators

*Ready for the next phase when:*

- ☐ Teams proactively adjust practices without being told
- ☐ Learning from failures is routine and celebrated
- ☐ New practices emerge organically from teams
- ☐ Organization adapts to market changes quickly
- ☐ People want to join your teams (reputation spreads)

#### ⚠ Red Flags

*Don't proceed if:*

- ☐ Improvement requires external pressure
- ☐ Failures are hidden rather than learned from
- ☐ Innovation only happens when mandated
- ☐ Market changes catch the organization off guard

**Common Pitfalls:** Treating transformation as "done"; stopping leadership development; letting practices calcify

**Remember:** Timelines are illustrative, not prescriptive. A nimble startup may need 6 months total; a large enterprise may take 2+ years. Adjust to your organization's size, culture, and capacity for change.