

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.