

Effective mobilisation sets your project or programme on the path to success. While it's crucial to verify that you've executed this step properly, existing checklists may not cover every unique aspect. This concise guide offers you a straightforward checklist that is absolutely free to download, along with tips to tailor it to fit your specific needs perfectly.

Your own mobilisation checklist

Many of the challenges experienced during the delivery of a complex change programme can be avoided by preparing well, but the pressure to get started is often irresistible and the opportunity to set up the programme successfully is compromised as a result.

We developed this self-assessment to help us when we are mobilising programmes for our clients, and having been asked for copies, we decided to produce this brief guide to using the self-assessment, including a free copy for you to download.

Free download



Click on the image on the left to download a copy of the Excel spreadsheet containing the Mobilisation Questionnaire.

You are free to use and customise this so that it best suits the needs of your projects and programmes.

Using the checklist

The mobilisation checklist consists of data in three tabs:

1 Questionnaire

A series of statements by theme, for which you score according to whether you agree or disagree.

2 Data

A simple summary of the scores from the Questionnaire. If you change a score, you must refresh this data.

3 Chart

A Radar Chart that illustrates the scores you have entered, allowing you to see insights at a glance.

Modifying the checklist

You can customise the checklist in several ways:

- Delete anything that you don't think you need.
- Add your own questions (statements).
- Add your own themes.
- Change the scoring system.
- Change the way the Radar Chart is displayed, for example by changing the axes or titles.

Sample output

This is an example of the Radar Chart (Spider Diagram) that is generated.



A few notes on this chart:

- Not all areas of mobilisation need to score high. For example, 'Suppliers' may score low where there simply are no suppliers involved.
- Conversely, you should carefully consider low scores in those areas that we all know are important - 'Vision', 'Business Case', 'Leadership and Sponsorship' are good examples.

Improving your scores

Tab 1 of the spreadsheet, contains an empty column where we find it useful to enter planned actions.

For example, if 'Governance' is scoring low, then you might want to record the actions that you believe are necessary to get the score back where it needs to be.

When might you use this checklist?

- **Proactively:** before you embark on a step-change in your transformation ambition.
- **Reactively:** when delivery of a current change initiative is struggling – especially in early part of the lifecycle.
- **Responsively:** when recent change has been disappointing or unsuccessful.
- **Selectively:** in change initiatives where there is high exposure or risk.
- For **reassurance:** when the change leader would benefit from some practical support.