

Readiness Assessment & Execution Framework

Prepared for the 2026 LMA Mid-Atlantic Regional Conference | From Readiness to Results: Building Tech-Enabled Solution That Work

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Background

Whether a technology-enabled change, a process redesign, or a firmwide program, this framework proposes two phases for successful change management:

- Phase I — Operational Readiness Assessment: determine whether your organization is positioned to execute.
- Phase II — Execute with Accountability: support successful implementation and ongoing support.

Phase I: Operational Readiness Assessment

Complete this assessment with more than one respondent group. At a minimum, include the executive sponsor and a sample of the people whose day-to-day work the initiative will change.

Results are not always tied to whether and how you proceed. They provide information to be mindful of as the effort progresses. Pay particular attention to gaps in how different respondent groups score the same dimension, as that could signal a need for further evaluation.

Score each question using the scale below to assess whether to proceed, close specific gaps first, or resequence.

✓ Ready Can be answered affirmatively, with evidence — e.g., a named sponsor exists, decision rights are documented.	🕒 In Progress Some elements exist but are incomplete — e.g., a process exists but isn't documented.	✗ Not Ready This area is largely undefined or is actively working against the initiative.
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1

Goals and Governance

Is there a clear, agreed-upon goal for this effort? Are decision rights, sponsorship, and escalation paths defined?

Diagnostic Questions	Ready	In Progress	Not Ready
Can leadership articulate the goal, and would they all articulate it the same way?	☐	☐	☐
Is there a named executive sponsor with authority to remove obstacles?	☐	☐	☐
Are decision rights defined (who approves what, and at what threshold)?	☐	☐	☐
What is the escalation path to ensure roadblocks do not become persistent barriers?	☐	☐	☐

2

Workflow Assessment and Design*Are the underlying workflows for this initiative documented and consistent?*

Diagnostic Questions	Ready	In Progress	Not Ready
Can the current process be described the same way by multiple people?	☐	☐	☐
Are there bottlenecks or workarounds already in place?	☐	☐	☐
Would this initiative be layered onto an existing process, or does the process itself need to be redesigned first?	☐	☐	☐

3

People, Capacity, and Culture*Does the organization have the capacity and appetite to absorb this change right now?*

Diagnostic Questions	Ready	In Progress	Not Ready
Do current team members have capacity given other competing priorities, or would additional support be needed?	☐	☐	☐
Do the people whose day-to-day work will change have a voice in how it progresses?	☐	☐	☐
Does your organization have a PMO or change management function with whom you can partner?	☐	☐	☐
Does the organization have an appropriate budget to support the initiative (including additional resources, if needed)?	☐	☐	☐

4

Technology and Data*Are the infrastructure and data behind this initiative stable?*

Diagnostic Questions	Ready	In Progress	Not Ready
Is the underlying data clean, accessible, and governed?	☐	☐	☐
Does the initiative depend on systems that are stable, or ones already slated for replacement?	☐	☐	☐
Does the initiative require system integrations that have been proven viable?	☐	☐	☐
Who owns technology decisions, and are they at the table?	☐	☐	☐
Where applicable, does the effort meet relevant client, security, or compliance requirements?	☐	☐	☐

5

Stakeholder Alignment

Do stakeholders agree on why this effort is important and have a shared definition of what success looks like?

Diagnostic Questions	Ready	In Progress	Not Ready
Would stakeholders outside of leadership, those executing the work and affected by it, describe the goal and definition of success the same way?	☐	☐	☐
Does the effort align with the firm's broader strategic goals?	☐	☐	☐

The Readiness Gate

Once all five dimensions are reviewed and scored, determine whether you are ready to proceed using the chart below. Assess whether to proceed, close specific gaps first, or resequence.

Turning Readiness Into Action

Plot each initiative by its impact and its Phase I readiness to determine next steps.

	LOW IMPACT	HIGH IMPACT
HIGH READINESS	Reconsider Priority Revisit whether this initiative belongs on the roadmap right now, or whether resources are better utilized elsewhere.	Proceed Move into Phase II: Execute with Accountability. The organization is positioned to execute this well. Build the roadmap and get started.
LOW READINESS	Deprioritize Low impact and low readiness make this a poor use of resources right now. Revisit later if either factor changes.	Pilot or Close Gaps When an effort is too valuable to shelve but not yet ready to launch firmwide, consider testing on a smaller scale while assigning owners to close specific readiness gaps.

For a mixed result (some dimensions Ready, others In Progress), plot based on the overall pattern: mostly Ready sits in the upper half, mostly Not Ready sits in the lower half.

Phase II: Execute with Accountability

Once an initiative clears the readiness gate, these next steps turn it into resourced, measured, sustained work.

1

Clarify and Prioritize

Distill the firm's goal into a short, focused list of priorities and translate each into specific initiatives tied to concrete outcomes.

SAMPLE OUTPUT

A prioritized list of 3–5 priorities, each with a clear scope, objectives, owners, and key milestones.

PRO TIP

Use a simple prioritization framework, such as the readiness-gate chart above, to rank initiatives based on potential impact and alignment with desired outcomes. Weigh feasibility and risk alongside impact, not just strategic fit.

2

Build a Roadmap and Define Accountability

Create a practical roadmap that turns initiatives into executable work. Address sequencing and dependencies, major milestones, required resources (people, process, technology, and budget), timelines, and accountability. Name an owner, typically the executive sponsor named in Phase I, or a designee. Where the initiative involves new tools, systems, or process changes, identify the people whose day-to-day work will change and how they'll be supported through it. Ensure a communication structure has been established covering those most significantly impacted, as well as how broader communication will be handled and who is responsible for it.

SAMPLE OUTPUT

A Gantt chart or execution dashboard paired with a RACI matrix defining ownership and decision authority.

PRO TIP

Incorporate clear status labels tied to each initiative so stakeholders can easily see progress (on track, off track, at risk, deferred, complete).

3

Define Success Measures

Agree on how success will be measured across the portfolio of projects. Identify structural measures (what must exist or change: governance, processes, tools), outcome measures (revenue, profitability, client retention), and, where relevant, adoption measures (is the result of the project being used). Track adoption and value separately as usage alone doesn't confirm the initiative delivered what was expected. Pair any adoption measure with a specific value measure (e.g., time saved, cost avoided, revenue influenced) tied back to the original goal.

OUTPUT

A success measures scorecard (Excel/Google Sheets) tracking 2–3 structural and 2–3 outcome measures per priority.

PRO TIP

Link outcome measures directly back to your strategic priorities so you can see which initiatives are driving firm performance.

Embed into Business Planning and Reporting

Ask stakeholders to map their plans and budget requests to one or more strategic priorities using shared success measures from the scorecard, when possible. Where a priority requires new skills or ways of working, include training in the budget request.

OUTPUT

Updated budgets, practice plans, and KPIs linked to strategic priorities and reflected in practice management documentation.

PRO TIP

Ensure visibility into this alignment so stakeholders stay committed and reinforce the connection between strategy and performance.

Review, Escalate, Reinforce, and Communicate

Set a regular cadence for working sessions to review the roadmap and related efforts, project status, blockers, and next steps, and document decisions to change course or escalate issues. Use this cadence to also surface where adoption is lagging, and to decide how to reinforce the change (additional support, revised timeline, renewed communication). Establish governance for the technology, including which sponsor will ensure compliance and how new features and requests will be handled. Build in room to evaluate, pivot, or adjust course as new information comes in, and establish a clear approach for communicating progress, decisions, and changes in priorities to relevant stakeholders.

OUTPUT

A calendar of monthly review meetings; a documented escalation protocol outlining who escalates what, to whom, and by when; a concise status update shared with stakeholders; a short list of what's being reinforced or adjusted based on adoption and feedback.

PRO TIP

Ensure decisions to modify, pivot, or pause initiatives are documented and communicated consistently so teams remain aligned on priorities and expectations.

Points of Connection

Phase I confirms the goal itself is real, agreed upon, and worth pursuing, and that the organization can execute it well. Phase II takes that agreed goal and turns it into specific, resourced, measured initiatives, then sustains them.

Together they form a repeatable cycle: confirm the goal and assess readiness, execute with accountability, and carry what's learned into the next initiative.