

Readiness Assessment

Prepared for: OCM Lead, Project Lead & Executive Sponsor | Initiative: [REDACTED] | Assessment Date: [REDACTED]

SECTION 1 — READINESS FRAMING

This assessment covers people readiness only — not [REDACTED]'s technical readiness, model performance, or integration testing, which are out of scope for this document. The data source for this assessment is a formal readiness survey that is planned but has not yet been conducted; current ratings below are based on project lead assessment, pending that survey. The organization is currently at the "aware but uncertain" stage of the change journey — employees know something is changing but do not yet understand it, meaning Attention is still forming and has not converted to Interest. Readiness gaps identified here drive the intensity of the communications, training, and support activities defined in D06 through D10.

SECTION 2 — READINESS DIMENSION ASSESSMENT

ATTENTION — Rating: Developing

Current employee awareness is minimal — a general reference to "AI-enabled service tools coming to Consumer & Business Banking" was made in a companywide town hall, but no site-specific or role-specific communication has reached the 21,000 affected colleagues. Because a prior companywide reference exists, this rates Developing rather than At Risk, but the rating should not be read as adequate: awareness is fragile, generic, and has not established what [REDACTED] actually is or means for any specific role. The Communication Plan (D06) must launch before any other employee-facing activity — training delivered before role-specific awareness is established will yield near-zero retention.

INTEREST — Rating: Critical Gap

Job security concern is the active resistance driver for this initiative, and current employee willingness is rated as skepticism — more doubters than supporters. Job security concern is the most psychologically charged resistance source the instrument measures. Interest cannot be built through feature messaging — it requires a direct, sponsor-level statement on employment impact before any other engagement activity. This is the single lowest-rated dimension in the assessment and the primary reason the overall verdict below is not a clean "Ready to Proceed."

EQUIPPED — Rating: Strong

Communication infrastructure for this initiative is genuinely solid: four channel types are confirmed (interactive/social, digital/written, in-person, and video/visual media), the planned update cadence is bi-weekly, and three feedback channels (surveys, Q&A sessions, and Teams channels) are already identified. This is a meaningful strength relative to the Interest dimension above — the infrastructure to reach people is in place; what is uncertain is whether the message itself will land given the active resistance driver.

CAPABLE — Rating: Developing

A training plan is confirmed with delivery dates set (a phased, six-week rollout across four site cohorts) and post-go-live support is planned. The rating holds at Developing rather than Strong because the organization is still at an early change-journey stage — training readiness on paper does not yet translate to demonstrated capability while awareness and interest remain unresolved. This change includes policy or compliance impacts; the Training Plan (D08) must explicitly cover the applicable disclosure and monitoring requirements named in the training scope, with completion tracking and mandated timelines confirmed before go-live. AI implementations require a specific capability layer beyond tool training: employees need to understand how to work alongside the AI, how to evaluate its outputs critically, and what to do when it is wrong. This is [REDACTED]'s first AI implementation, so a foundational AI literacy module must precede tool-specific training rather than being assumed as background knowledge.

SUSTAINMENT — Rating: Strong

The structural conditions for sustained adoption are in place: leaders have committed to modeling new behaviors post go-live, post-go-live review methods are defined (pulse checks, lessons-learned meetings, and surveys), and an escalation owner is named. This rating should not be mistaken for cultural readiness, however — three or more culture characteristics that inhibit change adoption are active (risk-averse, hierarchical, and change-fatigued), and cultural barriers are the leading cause of sustained non-adoption regardless of how sound the structural mechanics are. Displacement anxiety is an active culture signal; sustainment planning must account for colleagues who comply visibly while quietly disengaging — sentiment monitoring and direct sponsor communication on job security are Sustainment requirements here, not communications extras.

SECTION 3 — GROUP-LEVEL READINESS HEATMAP

Stakeholder Group	Attention	Interest	Equipped	Capable	Sustainment	Overall
Executive / Senior Leadership	Strong	Developing	Strong	Developing	Strong	Developing
People Managers	Developing	At Risk	Developing	At Risk	Developing	At Risk
Operations/Production Colleagues	Developing	Critical Gap	Strong	Developing	Developing	Critical Gap
HR/People Org Redeployment Team	At Risk	Critical Gap	Developing	Developing	Developing	Critical Gap

Stakeholder Group	Attention	Interest	Equipped	Capable	Sustainment	Overall
Legal & Compliance	Developing	Developing	Strong	Strong	Strong	Developing
Information Technology	Developing	Developing	Strong	Strong	Strong	Developing

Heatmap ratings are AI-inferred from assessment inputs. Overall readiness reflects the lowest dimension rating for each group.

SECTION 4 — GO/NO-GO ADVISORY

Verdict: Proceed with Caution. The single most critical readiness gap is Interest — job security fear is depressing engagement in the two groups carrying the largest share of the affected population, and this is a solvable, well-understood problem rather than a diffuse one. Before go-live, [REDACTED] must deliver a direct, standalone statement on employment impact (not folded into broader messaging), the champion network must be operational ahead of broad communications, and manager capability gaps must be closed through the Manager Enablement Kit before managers are asked to cascade any message about the tool. If these gaps are not addressed, the Interest and Overall Readiness ratings for the dominant contact-center population will not improve regardless of how much training or communication volume is added — this is a trust problem, not an information problem, and treating it as an information problem will produce a technically-trained workforce that still quietly resists the tool.

DISCLAIMER: This Go/No-Go Advisory is AI-generated based on the information provided in your GOccelerate™ assessment. It is designed to support planning decisions — not replace professional judgment. Significant decisions about go-live timing should involve your executive sponsor and, where applicable, a qualified OCM practitioner.

Prepared by GOccelerate™ | [REDACTED] | Confidence: Very High (100%)

The GOccelerate People Risk Index (PRI) is a formative, expert-derived index of people and adoption risk across four dimensions — Leadership, Stakeholder, Capability, and Sustainment — grounded in established organizational change management practice. Dimension scores reflect equally weighted, normalized risk points assigned through expert judgment rather than statistically estimated weights. Baseline results derive from a structured intake completed by a single informant and reflect that respondent's knowledge of the organization at the time of assessment; the accompanying Data Confidence indicator reflects the completeness of the information provided. Risk bands are provisional and subject to recalibration as GOccelerate's outcome-validation program accumulates post-implementation adoption data.