

Agile Needs Assessment Checklist

Below is a comprehensive, scalable Agile Needs Assessment Checklist built directly from the **five core diagnostic questions**, followed by a conclusionary statement:

- Where is agile being used?
- When is it being used?
- Who is using it?
- How is it being used?
- Why is it being used?

Where Is Agile Being Used? (Scope & Distribution)

1.1 Identify Agile Adoption by Function

Action:

- Map all departments (e.g., IT, HR, L&D, Operations, Marketing)
- Identify where agile practices are actively used

Ask:

- Is agile concentrated only in IT?
- Is there limited or no adoption of agile in business functions?
- Is an uneven adoption across similar departments present?

Evidence Indicators:

- Team workflows and process documentation
- Use of agile tools (e.g., boards, backlog systems)
- Interviews with department leads

1.2 Identify Agile Use by Project Type

Action:

- Review active and recent projects
- Identify which used agile, traditional, or hybrid approaches

Ask:

- Is agile applied only to specific project types?
- Is there a mismatch between project complexity and methodology?
- Are rigid methods overused in high-uncertainty projects?

Evidence Indicators:

- Project plans and timelines
- Retrospective records
- Delivery outcomes (delays, rework, change frequency)

1.3 Map Agile Across Value Streams

Action:

- Map workflows from idea to development, to delivery, through to evaluation
- Identify where agile practices are applied

Ask:

- Is agile being used only in isolated phases?
- Are there breakdowns between departments?
- Are there any delays at handoff points?

Evidence Indicators:

- Process maps
- Cycle time data
- Handoff delays and rework rates

1.4 Identify Gaps in Adoption

Action:

- Identify areas with no agile presence
- Determine whether gaps are intentional or due to capability issues

Ask:

- Is agile limited to one function (typically IT)?
- Are any bottlenecks caused by non-agile teams?
- Are there high-change areas without adaptive practices?
- Is there inconsistent adoption across similar teams?
- Is there an indication that “shadow agility” (informal, unsupported agile behavior) is present?

Evidence Indicators:

- Cross-team dependency delays
- Informal workflows are not reflected in official processes
- Feedback from teams about constraints

Where Is Agile Being Used? (Scope & Distribution)

2.1 Agile in Project Lifecycle Phases

Action:

- Identify where agile is used (planning, execution, review, delivery)

Ask:

- Is agile used only during some or a single lifecycle phase?
- Is traditional planning happening without iteration?
- Is there a lack of feedback in the early phases of the project?

Evidence Indicators:

- Project lifecycle documentation
- Planning vs. execution timelines
- Frequency of scope changes

2.2 Agile in Day-to-Day Operations

Action:

- Assess whether agile practices are used outside formal projects

Ask:

- Is agile limited to “special projects”?
- Are continuous improvement practices absent?
- Is there a lack of daily workflow visibility?

Evidence Indicators:

- Team rituals (stand-ups, reviews)
- Operational dashboards
- Continuous improvement logs

2.3 Frequency of Iteration Cycles

Action:

- Document sprint or iteration cadence

Ask:

- Are there long or inconsistent cycles?
- Is there misalignment across teams?
- Are iterations tied to outcomes? Or not?

Evidence Indicators:

- Sprint schedules
- Delivery cadence data
- Release frequency

2.4 Responsiveness to Change

Action:

- Evaluate how quickly teams adapt to new information

Ask:

- Are there delays in the decision-making process?
- Is there resistance to changing plans?
- Are there heavy approval processes in place?

Evidence Indicators:

- Change request timelines
- Decision latency
- Escalation frequency

Who Is Using Agile? (Roles, Authority, and Participation)

3.1 Roles Practicing Agile

Action:

- Identify who uses agile (teams, managers, leadership)

Ask:

- Is agile limited to delivery teams?
- Is there a lack of leadership participation?
- Is there confusion of roles?

Evidence Indicators:

- Role definitions
- Participation in agile ceremonies
- Interview feedback

3.2 Decision-Making Authority

Action:

- Determine where decisions are made

Ask:

- Are there any centralized decision bottlenecks?
- Do teams lack autonomy?
- Are approvals excessive?

Evidence Indicators:

- Decision logs
- Approval workflows
- Escalation patterns

3.3 Cross-Functional Collaboration

Action:

- Assess team composition and collaboration

Ask:

- Are teams siloed?
- Are there delays in handoffs?
- Is there limited stakeholder involvement?

Evidence Indicators:

- Team structures
- Collaboration tools usage
- Handoff delays

3.4 Leadership Support and Behavior

Action:

- Evaluate leadership alignment with agile principles

Ask:

- Are leaders enforcing process over outcomes?
- Is there misalignment between messaging and behavior?
- Is a lack of support for experimentation present?

Evidence Indicators:

- Leadership communication
- Decision patterns
- Resource allocation

How Is Agile Being Used? (Practices vs. Mindset)

4.1 Agile Practices in Use

Action:

- Identify the use of agile tools and ceremonies

Ask:

- Are there inconsistencies in execution?
- Is there mechanical participation?
- Is there a lack of value in ceremonies?

Evidence Indicators:

- Meeting artifacts
- Backlog quality
- Retrospective outputs

4.2 Alignment Between Practices and Outcomes

Action:

- Compare activities to results

Ask:

- Is there high activity, but low impact?
- Are there improvements over time?
- Are metrics output-focused?

Evidence Indicators:

- Performance trends
- Customer outcomes
- Delivery metrics

4.3 Adaptability of Processes

Action:

- Assess whether teams evolve their processes

Ask:

- Is there a rigid adherence to frameworks?
- Is experimentation present?
- Is there resistance to change?

Evidence Indicators:

- Retrospective changes implemented
- Experimentation logs
- Process updates over time

4.4 Feedback Loops

Action:

- Evaluate feedback mechanisms

Ask:

- Is feedback delayed or absent?
- Is customer input limited?
- Are retrospectives superficial?

Evidence Indicators:

- Feedback frequency
- Customer involvement
- Actionable insights captured

4.5 Integration with Project Management

Action:

- Assess alignment with governance structures

Ask:

- Is there conflict between agile teams and PMO?
- Are there duplicate reporting structures?
- Are hybrid models lacking?

Evidence Indicators:

- Governance documents
- Reporting requirements
- Stakeholder feedback

Why Is Agile Being Used? (Intent & Value)

5.1 Organizational Drivers

Action:

- Identify reasons for adopting agile

Ask:

- Is adoption trend-driven?
- Is there a lack of clear objectives?
- Are expectations misaligned?

Evidence Indicators:

- Strategy documents
- Leadership statements
- Initiative justifications

5.2 Alignment with Business Goals

Action:

- Evaluate connection to strategic outcomes

Ask:

- Is there a weak linkage to business value?
- Are activities tied to outcomes?
- Are there conflicting priorities?

Evidence Indicators:

- Strategic plans
- KPI alignment
- Outcome tracking

5.3 Metrics Used to Measure Success

Action:

- Identify performance metrics

Ask:

- Are output-based metrics (tasks completed) tracked, recorded, and analyzed?
- Is there a lack of outcome metrics?
- Are value delivered metrics included?

Evidence Indicators:

- KPI dashboards
- Reporting systems
- Performance reviews

5.4 Perceived Value Across Stakeholders

Action:

- Gather feedback from leadership, teams, and customers

Ask:

- Is there a misalignment in perceived benefits?
- Are confidence levels in agile practices low?
- Is there resistance or skepticism?

Evidence Indicators:

- Survey results
- Interview data
- Stakeholder feedback

5.5 Sustainability of Agile Practices

Action:

- Assess long-term consistency

Ask:

- Is there evidence of a drop-off after the initial rollout?
- Is there a lack of reinforcement?
- Is there an absence of continuous improvement?

Evidence Indicators:

- Practice consistency over time
- Training and coaching programs
- Improvement initiatives

Conclusionary Statement

This Agile Needs Assessment Checklist is not intended to validate the existence of agile practices—it is designed to determine whether agility exists as an organizational capability. The distinction matters. Many organizations can point to stand-ups, sprints, and backlogs, yet still struggle with slow decision-making, siloed work, and limited adaptability. The insights generated through this assessment should be used to move beyond surface-level adoption and toward meaningful, system-wide improvement.

By examining where, when, how, by whom, and why agile is used, organizations gain a clearer picture of how work actually happens—not how it is assumed to happen. The inclusion of observable patterns and evidence indicators ensures that findings are grounded in reality, enabling more accurate identification of constraints, bottlenecks, and misalignments. This, in turn, creates a foundation for targeted, high-impact interventions.

Agility is not achieved through implementation alone—it is developed through continuous alignment of processes, people, and decision-making systems. Organizations that treat this assessment as a recurring diagnostic tool rather than a one-time activity are better positioned to adapt, improve performance, and deliver sustained value in complex, changing environments.