

# The Executive Leader's Execution Checklist

*A pre-flight check for whether a strategic initiative is actually  
set up to succeed — twelve questions, asked honestly.*



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# How to Use the Execution Checklist

## Checklist Overview

This is a quick reference for executive leaders to check whether a strategic initiative has what it needs to move from vision to execution — clarity, alignment, and the right support. Every question gets a plain yes or no. A flagged answer isn't a failure; it's exactly where to look before something quietly breaks downstream.

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### Getting Started

- 1. Name the Initiative.** Which strategic initiative, which executive sponsor, and when you're running this check.
- 2. Answer All Twelve, Honestly.** A straight yes or no — not “it depends.”
- 3. Flag the Risk Answers.** The shaded box on each row is the one to watch — most questions flag risk on a no, a few flag it on a yes. A check in the shaded box is worth a closer look.

### Facilitation Tips

- A “no” answered honestly is worth more than a “yes” answered hopefully.
- Return to this at major milestones, not just before kickoff — the answers move.

- 4. Read What Each Flag Means.** Every flagged answer maps to a specific, named risk on the Red Flag Reference.
- 5. Decide What You're Accepting.** You don't have to fix everything before you start — but you should know what you're accepting if you don't.
- 6. Sign and Hand It Over.** Sign it, then hand it to the transformation leader who'll own execution — they file it with the initiative's other artifacts and bring it back at each milestone.

### After You Answer

- Don't sit on a flag alone — bring it to the same room that owns the guiding principles and the governance board.
- A cluster of flags in one area (funding, staffing, alignment) is more urgent than one flag in isolation.

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**Strategic Initiative  
Name:**

 Core Banking Platform  
Replacement

**Executive  
Sponsor:**

J. Alvarez, COO

**Date:** 3/12

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| Description                                                                                                                                  | Yes | No |
|----------------------------------------------------------------------------------------------------------------------------------------------|-----|----|
| 1. Have all executive leaders made their support visible and consistent, so teams see this initiative as a clear top priority?               |     | ✓  |
| 2. Has the initiative been funded at a level that realistically supports delivery, including an appropriate contingency for risk and change? | ✓   |    |
| 3. Have guiding principles been established to anchor day-to-day decisions and keep execution aligned with the strategy?                     |     | ✓  |
| 4. Do all executive stakeholders agree on the guiding principles and actively support their use in decision-making?                          |     | ✓  |
| 5. Has the initiative's priority been clearly set against other strategic initiatives, department projects, and ongoing operations?          | ✓   |    |
| 6. Is an experienced program manager in place and empowered to deliver based on the Steering Board's direction?                              | ✓   |    |
| 7. Are regular board briefings planned, with Marketing engaged to shape clear, consistent messaging for stakeholders?                        | ✓   |    |
| 8. Have potential prioritization conflicts with other initiatives been identified and addressed?                                             | ✓   |    |
| 9. Are there business or customer timing constraints that could put delivery at risk?                                                        | ✓   |    |
| 10. Are there unresolved technical debt issues that must be addressed for this initiative to succeed?                                        |     | ✓  |
| 11. Are there staffing barriers preventing this initiative from getting the focus and capacity it requires?                                  |     | ✓  |
| 12. Are you confident you have the right structure in place to succeed?                                                                      |     | ✓  |

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What each flag actually risks — all twelve, not just this initiative's five — is on the next page.

|                                          |                              |             |      |
|------------------------------------------|------------------------------|-------------|------|
| <b>Accepted By (Executive Sponsor)</b>   | J. Alvarez, COO              | <b>Date</b> | 3/12 |
| <b>Handed To (Transformation Leader)</b> | M. Chen, Transformation Lead | <b>Date</b> | 3/14 |

# What Each Flag Means

## The Twelve Red Flags

Every question on the checklist maps to one of these. Use this page whenever a box lands on the shaded side — on this initiative or the next one.

|                                           |                                                                                                                                                                                                                                                                       |
|-------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>1. Visible Support</b>                 | Mixed signals from the top create hesitation below. Visible alignment removes doubt and accelerates execution.                                                                                                                                                        |
| <b>2. Realistic Funding</b>               | Underfunding is one of the fastest ways to derail execution. A realistic budget with contingency avoids stalls midstream.                                                                                                                                             |
| <b>3. Guiding Principles Established</b>  | Without agreed guardrails, daily decisions drift. Guiding principles keep teams focused without requiring constant escalation.                                                                                                                                        |
| <b>4. Shared Commitment to Principles</b> | Even one dissenting voice at the top can fracture alignment. Shared commitment builds organizational confidence.                                                                                                                                                      |
| <b>5. Clear Priority Ranking</b>          | Competing priorities sink execution. Clear ranking ensures resources flow to what matters most.                                                                                                                                                                       |
| <b>6. Empowered Program Manager</b>       | A program manager without authority is set up to fail. Empowerment ensures leadership intent translates to action.                                                                                                                                                    |
| <b>7. Consistent Board Communication</b>  | Inconsistent communication erodes trust. Coordinated messaging keeps the organization aligned and confident.                                                                                                                                                          |
| <b>8. Conflicts Identified Early</b>      | Hidden conflicts cause slowdowns later. Surfacing and resolving them early keeps momentum intact.                                                                                                                                                                     |
| <b>9. Timing Constraints</b>              | External timing factors — customer commitments or regulatory deadlines — can't be shifted. Acknowledging them early avoids backpedaling later.                                                                                                                        |
| <b>10. Technical Debt</b>                 | Technical debt ignored at the start often resurfaces as costly delays. Tackling it upfront protects delivery.                                                                                                                                                         |
| <b>11. Staffing Barriers</b>              | Execution fails when people are spread too thin. Removing staffing barriers signals leadership's commitment to success.                                                                                                                                               |
| <b>12. Confidence in Structure</b>        | Without clear governance, defined roles, and a reliable delivery model, execution depends on individual effort and luck. The right structure gives teams consistency, provides leaders with transparency, and reassures shareholders that strategy will be delivered. |

|                                   |                           |              |
|-----------------------------------|---------------------------|--------------|
| <b>Strategic Initiative Name:</b> | <b>Executive Sponsor:</b> | <b>Date:</b> |
|-----------------------------------|---------------------------|--------------|

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|----------------------------------------------------------------------------------------------------------------------------------------------|-----|----|
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|                                   |  |      |  |
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# Execution Checklist

## Bringing It All Together

This checklist doesn't fix anything by itself — it just makes sure nothing important gets assumed. A flag here is cheaper to face now than to discover halfway through execution.

- **Catch mixed signals** from leadership before teams quietly stall waiting for clarity.
- **Catch underfunding** before it stalls the initiative midstream.
- **Catch competing priorities** before they sink execution instead of after.
- **Catch a program manager without real authority** before the initiative depends on individual heroics.

You'll know it's working when a flag here becomes something the room decided to accept, not something nobody noticed.

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## Questioning Your Execution Readiness?

If you're questioning whether your organization has the execution muscle it needs, contact Metagyre — we'll help you see where your team stands and what it will take to get strategy moving.

