

The Initiative Complexity Scorecard

A quick way to size up how complex and risky an initiative really is — bigger than a breadbox, smaller than a refrigerator — before you fund it.



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How to Use the Complexity Scorecard

Scorecard Overview

Score the initiative across seven categories — customer impact, business unit impact, technology impact, vendor influences, cybersecurity impact, regulatory constraints, and schedule constraints. Each category has four lines, ranked from highest complexity to minimal; pick whichever is most true right now, not the one you're hoping becomes true.

Getting Started

1. Score It Separately. The executive sponsor and the transformation leader each go through all seven categories on their own, before comparing notes.

2. Pick the Line That Fits. The description that's most true right now — not the one you're hoping becomes true.

3. Add It Up. Each pick scores 4 (top line) down to 1 (bottom line). Total across all seven categories.

Facilitation Tips

- A score that surprises you is more useful than one that confirms what you already believed.
- Don't average disagreements away — the gap itself is the finding.

4. Know Your Size. 7–13 is Small. 14–20 is Medium. 21–28 is Large — somewhere between a breadbox and a refrigerator.

5. Compare Notes. Bring your two scorecards together. Where they match, move on. Where they don't, that's the conversation.

6. Name the Mitigation for Every High Score. More budget, more time, or an SME brought in before you need one.

After You Compare

- A high score isn't a reason to say no — it's a reason to name what you're doing about it.
- Rerun this if the vendor, timeline, or scope changes materially; the score moves with the facts.

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Which initiative is this for?

Core Banking Platform Conversion

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Category	Sponsor's Score	Leader's Score	Gap Note
Customer Impact	4	4	
Business Unit Impact	3	4	Leader sees more units touched than sponsor realizes.
Technology Impact	3	3	
Vendor Influences	4	4	
Cybersecurity Impact	2	3	New vendor brings a security model neither has fully scoped yet.
Regulatory Constraints	2	2	
Schedule Constraints	3	4	Sponsor sees a target; Leader knows the vendor contract makes it a hard deadline.
Total	21	24	Both land in Large — fund and staff it accordingly.

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Mitigation Example

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For the schedule gap, the team brought in a conversion specialist to validate the vendor's cutover timeline before committing budget — turning “we hope this holds” into “we’ve verified this holds.”

Which initiative is this for?

Circle one line per category, then score 4 (top) down to 1 (bottom).

Customer Impact

- [4] Existing external customers impacted — customer action required
- [3] Visibility of change to existing external customers — action not required
- [2] Internal customers impact only — action may or may not be required
- [1] No external customer visibility

Business Unit Impact

- [4] More than five business units
- [3] Three to five business units
- [2] Two business units
- [1] One business unit

Technology Impact

- [4] New solution or enhancement to undocumented solution
- [3] Important enhancement to existing, documented, critical solution
- [2] Migration or upgrade of existing application or lifecycle of infrastructure
- [1] No solution development required

Vendor Influences

- [4] Dependent on new vendor or new product from existing vendor
- [3] Vendor participation required on existing system (major involvement)
- [2] Stable vendor relationship involvement (some involvement)
- [1] No vendor involvement

Cybersecurity Impact

- [4] Cybersecurity breach or mandated remediation
- [3] New cybersecurity technology, procedure, or requirement
- [2] Existing cybersecurity requirements must be included in solution
- [1] No cybersecurity impact on project

Regulatory Constraints

- [4] New regulatory requirement must be implemented
- [3] Change to regulatory requirement must be implemented
- [2] Existing regulation must be included in solution
- [1] No regulatory impact on project

Schedule Constraints

- [4] Scheduled completion is a hard deadline that cannot change
- [3] Minor schedule variations are acceptable but deadlines are real targets
- [2] Use an agile / Kanban / Scrum approach to set delivery targets
- [1] Schedule is flexible

Which initiative is this for?

Your Scores

Once you've each circled your picks, bring your scorecards together here.

Category	Sponsor's Score	Leader's Score	Gap Note
Customer Impact			
Business Unit Impact			
Technology Impact			
Vendor Influences			
Cybersecurity Impact			
Regulatory Constraints			
Schedule Constraints			
Total			

Mitigation Plan

For any category scored 3 or higher, or any gap between scorecards — what are you doing about it?



Initiative Complexity Scorecard

Bringing It All Together

This scorecard doesn't approve or reject an initiative — it tells you what you're approving. A high total isn't a reason to say no; it's a reason to fund and staff it like the risk is real.

- **Surface disagreement** between the sponsor and the transformation leader before it becomes a surprise mid-project.
- **Turn a high score into a specific ask** — more budget, more time, or an SME brought in before you need one.
- **Give every initiative a comparable size**, so leadership can see which ones actually carry the most risk across the portfolio.
- **Start with eyes open**, not optimism.

You'll know it's working when a high score changes the budget or the timeline before the initiative starts — not after it's already slipping.

Want a Second Set of Eyes on a Complex Initiative?

Contact Metagyre to learn how we support leadership teams sizing up risk before they commit — from this scorecard through the governance board that reviews it.

