Delivery Risk Diagnostic

Pre-Project Risk Assessment & ROM Calibration Tool — v2.0

Two tools. One truth.

The Delivery Risk Diagnostic forces you to answer 9 uncomfortable questions about your project before it starts. No vibes. No optimism. Just observable conditions that predict delivery friction.

The ROM Calculator translates those answers into dollars and days. It shows you the gap between what you want to spend and what reality will cost.

Together, they do what no vendor quote ever will: They tell you the truth before the contract is signed.

THE 9 RISK FACTORS

Factor	What It Measures	Why It Matters
1. Competence	Team skill gaps, learning curves	You pay for expertise you don't have
2. Architectural Debt	Tech debt, customization sins	The rework tax compounds silently
3. Legacy Systems	Dual environments, sunset resistance	Parallel systems = parallel costs
4. Bend Resistance	Forcing platform to match old processes	Custom "how we do it" = custom maintenance
5. Machine Readiness	AI/automation on broken foundations	Bad data in = confident wrong answers out
6. Governance Friction	CAB delays, approval chains	Every approval cycle costs momentum
7. Integration Complexity	APIs, connectivity, data migration	Connected systems become dependencies
8. Platform Maturity	Version currency, licensing gaps	Technical barriers multiply effort
9. Customer Readiness	Sponsor engagement, decision authority	Absent leadership = stalled delivery

HOW TO USE THIS TOOLKIT

Step 1: Download Both Tools

- **Delivery Risk Diagnostic (PDF)** — This document. The questionnaire.
- **ROM Calculator (Excel)** — The math engine. Available at www.sytycsn.com

Step 2: Select Your Engagement Type

Before assessing factors, identify what kind of project this is:

Type	Modifier	When to Use
Assessment	0.7×	Discovery/analysis only, no build
Implementation	1.0×	Standard delivery (baseline)
Rescue/Remediation	1.15×	Recovery from prior failure
Upgrade	1.05×	Version migration focus
Optimization	1.05×	AI/automation enablement

Step 3: Complete the Diagnostic Honestly

Work through all 9 factors on the following pages. Check every box that applies. Be ruthless.

The questions are designed to surface observable conditions—things you can verify, not feelings you can rationalize.

■■ **WARNING: Optimism here becomes overruns later.**

Step 4: Transfer Multipliers to ROM Calculator

Take your multiplier from each factor and enter it into the ROM Calculator. Watch the numbers compound.

Step 5: Face Reality

The calculator shows you:

- **Naive Estimate** — What you walked in with
- **Reality-Adjusted ROM** — What you should actually budget
- **Risk Delta** — The cost of optimism
- **Five Taxes View** — Conceptual breakdown (ties to book framework)

Step 6: Make a Decision

Multiplier	Risk Level	Field Move
1.0× – 1.5×	LOW	Proceed with 10-15% contingency
1.5× – 2.0×	MODERATE	Add buffer, increase oversight
2.0× – 2.5×	HIGH	Revisit scope, phase the work
2.5×+	CRITICAL	STOP. Remediate before proceeding

THE MATH — Why It Works

Multiplication, Not Addition

Risks don't sit side-by-side. They amplify each other.

A team learning the platform (1.15×) working on a debt-laden instance (1.27×) with absent sponsors (1.13×) doesn't face a 55% increase.

> **They face: 1.15 × 1.27 × 1.13 = 1.65×**

And that's just three factors. **The compounding is the point.** It's why 'small' risks become catastrophic outcomes.

Realistic Ranges

- **Best Case (all 1.0×):** Greenfield, expert team, engaged sponsor. Rare but real.
- **Typical Brownfield:** 1.7× – 2.0×. This is most projects.
- **Troubled Project:** 2.0× – 2.5×. Requires executive intervention.
- **Rescue Territory:** 2.5×+. For every $1 spent on features, $1.50+ spent on friction.

CONNECTION TO THE BOOKS

The 9 operational factors map back to the Five Taxes framework from *So You Think You Can ServiceNow: Delivery Framework* (Book 2):

Diagnostic Factor	Book Tax
F1: Competence	Competence Tax
F2: Architectural Debt	Architectural Debt Tax
F3: Legacy Systems	Legacy Tax
F4: Bend Resistance	Bend Tax
F5 × F8: Machine + Platform	Machine's Tax
F6 × F7 × F9: Gov + Integration + Customer	Operational (Process Tax)

The diagnostic measures delivery reality. The Five Taxes explain why those realities exist. Together, they give you both the number and the narrative.

FACTOR 1: COMPETENCE

Range: 1.0× – 1.3× | **Maps to:** Competence Tax

Team skill gaps, learning curves, expertise mismatches. You pay for expertise you don't have—either in slower delivery or in mistakes that require rework.

Multiplier	Condition
1.0×	Team has delivered this exact scope before. Certified, experienced, no learning curve.
1.1×	Team is competent but new to this specific module or integration pattern.
1.15×	Mixed team—some experts, some learning. Knowledge transfer required during delivery.
1.2×	Team is mostly learning. Heavy reliance on documentation and external support.
1.3×	First-time implementation for this team. Significant skill gaps across multiple areas.

YOUR SCORE FOR COMPETENCE: _____×

FACTOR 2: ARCHITECTURAL DEBT

Range: 1.0× – 1.8× | **Maps to:** Architectural Debt Tax

Technical debt, customization sins, upgrade backlog, data quality issues. The rework tax compounds silently until it explodes.

Multiplier	Condition
1.0×	Clean instance. OOB configurations. Current version. No significant customizations.
1.1×	Minor customizations. Some technical debt but well-documented and manageable.
1.27×	Moderate debt. Custom scripts, modified OOB processes, some undocumented changes.
1.4×	Heavy customization. Upgrade blockers. Significant undocumented tribal knowledge.
1.6×	Severe debt. Platform is fragile. Changes break unexpected things. "Don't touch that."
1.8×	Critical. Platform requires remediation before any new work can safely proceed.

YOUR SCORE FOR ARCHITECTURAL DEBT: _____×

FACTOR 3: LEGACY SYSTEMS

Range: 1.0× – 1.25× | **Maps to:** Legacy Tax

Dual environments, sunset resistance, competing sources of truth. Parallel systems mean parallel costs—and parallel politics.

Multiplier	Condition
1.0×	Greenfield. No legacy system to replace or integrate with.
1.1×	Legacy exists but clear sunset plan. Data migration is straightforward.
1.15×	Legacy runs in parallel during transition. Dual-entry period required.
1.2×	Legacy sunset is politically contested. Some stakeholders resist migration.
1.25×	Legacy will remain indefinitely. Permanent integration and sync required.

YOUR SCORE FOR LEGACY SYSTEMS: _____×

FACTOR 4: BEND RESISTANCE

Range: 1.0× – 1.2× | **Maps to:** Bend Tax

Forcing the platform to match legacy processes instead of adapting to OOB capabilities. Custom "how we do it" = custom maintenance forever.

Multiplier	Condition
1.0×	Organization willing to adopt OOB processes. Change management is strong.
1.05×	Minor customizations to match business requirements. Mostly OOB.
1.1×	Moderate resistance. "We've always done it this way" conversations required.
1.15×	Significant resistance. Multiple process customizations demanded.
1.2×	Platform must bend completely to existing processes. Heavy customization required.

YOUR SCORE FOR BEND RESISTANCE: _____×

FACTOR 5: MACHINE READINESS

Range: 1.0× – 1.3× | **Maps to:** Machine's Tax

AI and automation readiness. Bad data in = confident wrong answers out. The platform's intelligence depends on your data foundation.

Multiplier	Condition
1.0×	Data foundations are solid. CMDB accurate. Clean master data. AI-ready.
1.1×	Data is mostly clean. Some gaps but manageable. Basic automation possible.
1.15×	Data quality issues. CMDB needs work. Automation will require data cleanup first.
1.2×	Significant data problems. AI/automation will produce unreliable results.
1.3×	Data foundations broken. Any AI/automation work requires major remediation first.

YOUR SCORE FOR MACHINE READINESS: _____×

FACTOR 6: GOVERNANCE FRICTION

Range: 1.0× – 1.2× | **Maps to:** Process Tax

CAB delays, approval chains, compliance overhead. Every approval cycle costs momentum. Governance without agility is bureaucracy.

Multiplier	Condition
1.0×	Agile governance. Quick approvals. Empowered decision-makers on the project.
1.05×	Standard governance. Weekly CAB. Predictable approval timelines.
1.1×	Slower governance. Multiple approval layers. 2+ week cycles common.
1.15×	Heavy governance. Everything requires committee approval. Change aversion.
1.2×	Governance paralysis. Approvals take months. Risk aversion blocks progress.

YOUR SCORE FOR GOVERNANCE FRICTION: _____×

FACTOR 7: INTEGRATION COMPLEXITY

Range: 1.0× – 1.3× | **Maps to:** Process Tax

APIs, connectivity, data migration, system dependencies. The systems you connect become dependencies you inherit.

Multiplier	Condition
1.0×	Minimal integration. Standard connectors. Clean data sources.
1.1×	Moderate integration. 3-5 systems. Modern APIs. Good documentation.
1.15×	Complex integration. 5-10 systems. Mix of modern and legacy APIs.
1.2×	Heavy integration. 10+ systems. Legacy protocols. Poor documentation.
1.3×	Integration nightmare. Critical dependencies on unstable systems. Real-time sync required.

> **YOUR SCORE FOR INTEGRATION COMPLEXITY:** _____×

FACTOR 8: PLATFORM MATURITY

Range: 1.0× – 1.15× | **Maps to:** Machine's Tax

Version currency, licensing gaps, multi-instance complexity. Technical barriers multiply effort.

Multiplier	Condition
1.0×	Current version (N or N-1). All required licenses. Single production instance.
1.05×	Slightly behind (N-2). Minor licensing gaps. Standard architecture.
1.1×	Behind on versions (N-3+). Some licensing constraints. Multi-instance complexity.
1.15×	Significantly outdated. Major licensing gaps. Complex instance architecture.

> **YOUR SCORE FOR PLATFORM MATURITY:** _____×

FACTOR 9: CUSTOMER READINESS

Range: 1.0× – 1.25× | **Maps to:** Process Tax

Sponsor engagement, SME availability, decision authority. Absent leadership = stalled delivery.

Multiplier	Condition
1.0×	Executive sponsor engaged. SMEs available. Clear decision authority. Resources committed.
1.05×	Good sponsorship. SMEs available but shared with other priorities.
1.13×	Sponsor engaged but not active. SME availability inconsistent. Decisions escalate frequently.
1.2×	Weak sponsorship. SMEs overcommitted. Decision-making is slow and contested.
1.25×	Absent sponsor. No dedicated SMEs. Every decision requires executive intervention.

YOUR SCORE FOR CUSTOMER READINESS: _____×

DIAGNOSTIC SUMMARY

Factor	Your Multiplier
1. Competence	_____ ×
2. Architectural Debt	_____ ×
3. Legacy Systems	_____ ×
4. Bend Resistance	_____ ×
5. Machine Readiness	_____ ×
6. Governance Friction	_____ ×
7. Integration Complexity	_____ ×
8. Platform Maturity	_____ ×
9. Customer Readiness	_____ ×
Engagement Type Modifier	_____ ×
TOTAL RISK MULTIPLIER	_____ ×

CALCULATION: Multiply all factors together (including engagement modifier).
Example: 1.15 × 1.27 × 1.1 × 1.05 × 1.15 × 1.1 × 1.15 × 1.05 × 1.13 × 1.0 = **2.14×**

Then: Base Estimate × Total Multiplier = Reality-Adjusted ROM
Example: 500 hours × 2.14 = **1,070 hours** (Risk Delta: 570 hours / $171,000 at $300/hr)

Most ROMs hide risk. This one exposes it.