



Digital Transformation Readiness Assessment Checklist

Score each item:

- Yes = 2 points
- Sometimes = 1 point
- No = 0 points

Operational Visibility

- We know where our biggest recurring administrative bottlenecks are.
- Important business files are centrally accessible and searchable.
- Managers can quickly see what approvals, tasks, or customer issues are pending.
- We are not heavily dependent on scattered paper records or private spreadsheets.

Workflow Efficiency

- Routine approvals are not delayed by manual signatures or email chasing.
- Customer communication notes are centrally visible.
- Scheduling and task tracking are not dependent on verbal reminders alone.
- Repetitive finance/admin tasks are being reduced digitally.

Leadership Planning

- We have identified modernisation priorities instead of buying software randomly.
- Leadership understands that transformation should be staged.
- We evaluate technology based on business friction removed—not demo impressiveness.
- We understand that not every trendy digital tool deserves immediate adoption.

Employee Readiness

- Staff have been considered in modernisation planning.
- We introduce change in manageable phases.
- Training is practical and task-based rather than abstract.
- We have employees who can champion new workflows internally.

Cybersecurity During Modernisation

- New digital tools are being introduced with password and MFA discipline.
- User access and permissions are reviewed regularly.
- Cloud sharing is not happening casually without oversight.
- Vendor trust is balanced with cyber caution.

Long-Term Resilience

- We review software subscriptions for overlap and waste.
 - We can measure whether digital upgrades are actually saving time.
 - Leadership monitors both efficiency and security during transformation.
 - We view modernisation as an ongoing business discipline, not a one-time event.
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SCORING RESULTS

38–48 Points → Strong Maturity

Your organisation is approaching modernisation with practical structure, leadership visibility, and healthy digital resilience.

22–37 Points → Moderate Exposure

You recognise the need for change but still maintain several manual or planning gaps that may slow transformation progress.

0–21 Points → High Vulnerability

Your business is likely carrying significant operational drag and digital hesitation that may reduce competitiveness and increase avoidable risk.