

Digital Transformation Readiness Assessment Checklist

Company Name:

Enter company name

Assessment Date:

dd - mm - yyyy



Conducted By:

Assessor name/team

Review Period:

e.g., Q4 2024

Section 1: Transformation Readiness Assessment

Company Name:

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Transformation Readiness Assessment

Q55

On a scale of 1-5, how ready is your organization for full transformation?

Purpose: Gap analysis from prior sections to establish baseline readiness.

☐

1

Not Ready: Significant barriers exist, limited digital capabilities, resistance to change

- ☐ **2 Beginning:** Some digital initiatives, but fragmented approach, minimal integration
- ☐ **3 Developing:** Moderate digital presence, some integrated systems, growing awareness
- ☐ **4 Advanced:** Strong digital foundation, coordinated transformation efforts, clear strategy
- ☐ **5 Fully Ready:** Comprehensive digital ecosystem, transformation-ready culture, agile processes

Action Items Based on Rating:

Document specific gaps identified and immediate next steps based on your selected rating...



Section 2: Gap Analysis & Strategic Planning

Company Name:

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Gap Analysis & Strategic Planning

Q56

What one thing is missing from this plan (add from your end)?

Type: Open-ended improvement suggestion

Example: Budget for external consultants, change management framework, etc.

Identify the most critical missing element from your current transformation plan. Consider resources, capabilities, processes, or strategic elements...



Implementation Strategy:

Timeline for addressing this gap

Budget/resource requirements

Responsible stakeholder/team

Q57

Will you form a transformation steering committee?

Purpose: Establish governance structure with defined responsibilities.

☐ **Yes** - We will establish a steering committee

☐ **No** - Alternative governance structure preferred

Committee Structure (if Yes selected):

Committee Chair/Executive Sponsor

Key department representatives

External advisors/consultants

Meeting frequency and format

Defined Responsibilities:

☐ Strategic direction and priority setting

☐ Budget approval and resource allocation

☐ Risk management and mitigation

☐ Performance monitoring and reporting☐ Change management oversight☐ Stakeholder communication

Section 3: Strategic Action Planning

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Strategic Action Planning

Q58

Top 3 improvised actionable steps based on responses?

Purpose: Synthesize assessment findings into concrete next steps.

Example: Quarterly trend scans for 2025 updates, stakeholder mapping, technology audit

Action Step 1 (Highest Priority):

Describe the specific action step

Timeline

Owner/Responsible Party

Success Metrics

Implementation details and required resources...

Action Step 2 (Medium Priority):

Describe the specific action step

Timeline

Owner/Responsible Party

Success Metrics

Implementation details and required resources...

Action Step 3 (Supporting Priority):

Describe the specific action step

Timeline

Owner/Responsible Party

Success Metrics

Implementation details and required resources...

Section 4: Monitoring & Strategic Outlook

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Monitoring & Strategic Outlook

Q59

How will you revisit this questionnaire (e.g., bi-annually)?

Purpose: Track progress against baselines and ensure continuous improvement.

- ☐ **Quarterly** - For rapid transformation phases
- ☐ **Bi-annually** - Standard assessment cycle
- ☐ **Annually** - For mature organizations
- ☐ **Custom Schedule** - Based on specific milestones

Review Process Details:

Review meeting cadence and participants

Progress tracking methods and tools

Baseline comparison process

Documentation and reporting procedures for tracking transformation progress...

Q60

Final reflection: Biggest opportunity/threat in 2025 digital landscape?

Purpose: Synthesize all angles and identify strategic focus areas.

Biggest Opportunity:

Describe the most significant opportunity your organization can capitalize on in 2025 (e.g., AI integration, market expansion, operational efficiency, customer experience enhancement)...

Strategic Actions for Opportunity:

Required capabilities or investments

Timeline for realization

Expected impact/ROI

Biggest Threat:

Identify the most significant threat to your digital transformation (e.g., cybersecurity risks, competitive disruption, regulatory changes, talent shortage)...



Mitigation Strategy:

Risk mitigation measures

Contingency planning

Monitoring and early warning systems

Assessment Summary & Next Steps

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Assessment Summary & Strategic Recommendations

Executive Summary

Provide a high-level summary of your organization's transformation readiness, key findings, and strategic direction...

Key Strengths Identified

☐ Leadership commitment and vision

☐ Existing digital infrastructure

☐ Skilled workforce and talent

☐ Financial resources and budget allocation☐ Cultural adaptability☐ Customer-centric focus

Critical Improvement Areas

☐ Change management processes☐ Technology integration and interoperability☐ Data governance and analytics☐ Cybersecurity and risk management☐ Skills development and training☐ Process automation and optimization

Immediate Next Steps (Next 30 Days):

List specific actions to be taken within the next 30 days...

Short-term Goals (3-6 Months):

Define key milestones and objectives for the next 3-6 months...

Long-term Vision (12+ Months):

Outline the strategic vision and major transformation goals for the next year and beyond...

Note: This assessment should be reviewed regularly and updated based on changing business needs, technological advances, and market conditions. Consider scheduling quarterly progress reviews to ensure alignment with strategic objectives.

Assessment Completed By: _____ **Date:** _____

Next Review Scheduled: _____ **Review Owner:** _____