



Are You Ready For **DIGITAL TRANSFORMATION**



Clarity Before Change

A practical checklist for evaluating your project before implementation begins.



Strategy, People, and Responsibilities

Before You Begin

Digital transformation begins with clarity.

Use this checklist to review whether your business has defined the problem, involved the right people, and prepared the conditions needed for a focused implementation.

For each question, select the answer that **best reflects the current situation**:

Yes ☐

Partially ☐

Not Yet ☐



Strategy and Outcomes

1. Is the business problem clearly defined?

Can the problem be described in practical terms, including where delays, errors, limitations, or unnecessary manual work currently occur?

Yes ☐
Partially ☐
Not Yet ☐

2. Are the expected outcomes documented?

Are the desired improvements clearly stated, rather than described through broad objectives such as “modernize” or “improve efficiency”?

Yes ☐
Partially ☐
Not Yet ☐

3. Can the requested outcomes be compared with the delivered result?

Is there a clear list that can later be used to determine whether the project delivered what was expected?

Yes ☐
Partially ☐
Not Yet ☐

4. Have the project scope and priorities been agreed?

Is there a shared understanding of what the project should include, what is essential, and what can be addressed later?

Yes ☐
Partially ☐
Not Yet ☐

People and Responsibilities

5. Have the affected users and project team been involved?

Have the people who understand the current work contributed their experience before important decisions were finalized?

Yes ☐
Partially ☐
Not Yet ☐

6. Are responsibilities and decision-making authority clearly assigned?

Does each area have a person responsible for providing information, approving decisions, and maintaining progress?

Yes ☐
Partially ☐
Not Yet ☐

7. Are onboarding, instructions, and documentation available?

Do the people involved receive enough context to understand the project, their role, and the processes they are expected to follow?

Yes ☐
Partially ☐
Not Yet ☐

8. Is there a clear process for feedback, approvals, and escalation?

Can questions and unexpected situations be directed quickly to someone with the knowledge and authority to respond?

Yes ☐
Partially ☐
Not Yet ☐

Workflows, Data, and Technology

9. Are the current workflows understood and documented?

Has the project team examined how work is currently performed, including exceptions, dependencies, and manual steps?

Yes ☐
Partially ☐
Not Yet ☐

10. Is the necessary data accessible and reliable?

Is the required information available, sufficiently accurate, and suitable for use within the proposed solution?

Yes ☐
Partially ☐
Not Yet ☐

11. Are existing systems and integration requirements known?

Has the company identified which platforms, databases, services, and external systems the new solution may need to work with?

Yes ☐
Partially ☐
Not Yet ☐

12. Has the technology been evaluated for long-term use?

Have maintainability, support, documentation, community, flexibility, licensing, and update requirements been considered?

Yes ☐
Partially ☐
Not Yet ☐

Pilot and Long-Term Support

13. Can the initiative begin with a focused pilot?

Can the project start with a limited problem, workflow, team, or business area before expanding?

Yes ☐
Partially ☐
Not Yet ☐

14. Are the pilot assumptions and expected outcomes defined?

Is it clear what the pilot should validate and which results would support further investment?

Yes ☐
Partially ☐
Not Yet ☐

15. Is the business prepared to support adoption?

Are time, training, communication, and internal support available for the people expected to use the solution?

Yes ☐
Partially ☐
Not Yet ☐

16. Is there a realistic plan for long-term ownership?

Has the company considered maintenance, updates, security, documentation, support, and future responsibility for the solution?

Yes ☐
Partially ☐
Not Yet ☐

Interpreting your results

This is a **readiness reflection**, not a **certification**.

The purpose of this checklist is not to produce a pass or fail result.

Its value comes from identifying which parts of the project are already clear and which areas may need further discussion before implementation begins.

Consider both the overall pattern of your answers and the importance of each individual question to your project.

Mostly *Yes* Answers

Your project appears to have a solid foundation.

The business problem, desired outcomes, responsibilities, workflows, and technical context appear sufficiently clear to support the next stage.

A suitable next step is to validate the most important assumptions through discovery and a focused pilot.

Consider *Next*

- Confirm the pilot scope.
- Agree on outcomes it should validate.
- Document responsibilities & approval processes.
- Establish how results will be reviewed.

Several *Partially* Answers

The overall direction may be appropriate, but some decisions, responsibilities, or dependencies still need clarification.

These gaps do not necessarily prevent the project from progressing. However, addressing them before implementation can reduce delays, inconsistent requirements, and unnecessary complexity.

Consider *Next*

- Identify which answers require more information.
- Assign responsibility for resolving each question.
- Involve the relevant users & business representatives.
- Revisit the scope before technical decisions become difficult to change.

Several *Not Yet* Answers

The initiative may benefit from additional discovery before technology or implementation decisions are finalized.

This can prevent the project from becoming defined by a platform, technology stack, or feature list before its actual needs are understood.

Consider *Next*

- Document the current situation.
- Define the expected outcomes.
- Identify the people who need to contribute to this.
- Clarify decision-making authority.
- Select one focused area for further investigation.

Questions to discuss next

Use this space to record the areas that require attention.

What requires clarification?

Who should be involved?

Which decision should be made first?

What could be tested through a focused pilot?

***Ready to Bring More Clarity to Your
Digital Transformation?***

Contact Neobyte Solutions to discuss *your* digital transformation and requirements.

Request a **free consultation!**

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