

Digitalisation Readiness Self-Assessment Checklist

Identify Hidden Manual Processes That May Be Limiting Business Value

Use this checklist to identify whether manual processes may be affecting efficiency, visibility, productivity, and scalability within your organisation.

Workflows & Coordination	
Teams rely heavily on email chains to complete business processes.	
Important approvals require manual follow-up	
Employees frequently chase updates from colleagues	
Tasks are transferred manually between departments	
Work often depends on informal communication rather than structured workflows	
Information & Reporting	
Reports require manual data collection	
Information is stored across multiple locations	
Teams spend significant time searching for information	
Operational reporting is inconsistent	
Business decisions rely on manually prepared reports	
Manual Administration	
Data is regularly entered into multiple systems	
Administrative work consumes a significant amount of employee time	
Repetitive tasks are completed manually	
Staff spend time updating spreadsheets instead of delivering value	
Operational knowledge depends on specific individuals	
Operational Visibility	

Leadership lacks real-time visibility of business operations	
Workflow bottlenecks are difficult to identify	
Process performance is difficult to monitor	
Delays are often discovered after they occur	
Accountability is unclear across some processes	

Your Results

0–5: Your organisation appears to have relatively mature operational processes with limited reliance on manual coordination.

6–10: Some manual processes may already be reducing efficiency, visibility, and productivity.

11–15: Operational friction is likely affecting consistency, decision-making, and business performance.

16–20: Manual processes may be limiting scalability, visibility, and long-term business growth. Significant opportunities for workflow improvement and digitalisation may exist.

Areas Worth Reviewing

- Workflow automation
- Process visibility
- Operational reporting
- Cross-team coordination
- Data management
- Approval processes
- Long-term scalability

Next Step

Digitalisation is not simply about introducing more technology. It is about reducing manual effort, improving visibility, and helping the business operate more effectively as it grows.

Book an Initial Online Assessment to discuss your business goals, requirements, and available options.

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