



FREE RESOURCE — READINESS ASSESSMENT

Digital Transformation Readiness Assessment

Evaluate your organisation's readiness for digital transformation across technology, people, processes, culture and strategy. Five scored dimensions, 37 maturity checkpoints — surface the gaps that need closing before you commit to a transformation programme, and build a roadmap you can defend to the board.

5 TECHNOLOGY

READINESS
DIMENSIONS & STRATEGIES

37 PEOPLE & SKILLS

MATURITY
CHECKPOINTS

/10

PROCESS & DATA

SCORE EACH
DIMENSION

Fillable

TICK & TYPE
IN ANY VIEWER

PREPARED FOR

UK SME leadership teams

PREPARED BY

Cloudswitched Ltd.

VERSION

2026 Edition

FORMAT

Interactive PDF

00

How to use this assessment

Work through this assessment **with your leadership team**, not alone behind a closed door. The diagnostic is built to surface honest disagreement — where finance, operations, IT and the people running the day-job all see the same gap differently — and turn it into a shared map of what needs fixing before a transformation programme begins.

Tick every checkpoint that is **fully in place** — not partially, not “we’re scoping it”, but documented and verifiable today. Score each section out of 10 in the box at the foot of the page. Low scores are **useful** — they tell you where to invest first. This is an **interactive PDF** — tick boxes and type scores and notes directly in any modern PDF viewer.

WHAT THIS ASSESSMENT IS

A pre-programme readiness baseline for UK SMEs considering digital transformation — covering technology infrastructure, people and skills, process and data, culture and leadership, and strategy and governance. It is not a benchmarking tool against other organisations; it is a diagnostic that informs your own transformation sequencing and the conversations you have with your board, your investors and your staff.

SCORING GUIDANCE

Award points where you have evidence the capability is in place — documented infrastructure, signed-off training plans, a written digital strategy, named transformation sponsors. Half-measures do not score. Round each section to the nearest whole number out of 10 and carry it forward to the readiness summary on page 8. A score **below 6 in any dimension** is a candidate for one of the top-three priority actions on page 9.

The five readiness dimensions

- **01 Technology Infrastructure** — connectivity, cloud-readiness, mobile device management, documentation, cybersecurity foundations, IT capacity.
- **02 People & Skills** — digital literacy, departmental champions, training programmes, leadership sponsorship, skills-gap planning, change management.
- **03 Process & Data** — process documentation, data quality, automation candidates, data centralisation, governance, reporting needs.
- **04 Culture & Leadership** — vision, multi-year budget, tolerance for failure, cross-departmental collaboration, customer feedback, outcome focus.
- **05 Strategy & Governance** — documented strategy, success metrics, governance framework, risk management, partner relationships, compliance, roadmap.

01

Technology Infrastructure Readiness

Assess whether your current IT infrastructure can actually support a digital transformation programme. If the foundations are shaky, every new tool you bolt on inherits the shake — the connectivity, the cloud posture, the security baseline and the documentation have to be solid before transformation projects scale.

- ☐ Your **internet connectivity** is fast, reliable and has capacity for cloud-based workloads (*symmetric leased line or business fibre with SLA*).
- ☐ Core systems — email, files, line-of-business apps — are **cloud-hosted or cloud-ready** for migration.
- ☐ **APIs and integrations** are available for key business applications to connect with new tools (*not just CSV exports*).
- ☐ Your network can support **remote and hybrid working** securely via VPN or Zero-Trust Network Access.
- ☐ **Mobile device management** is in place to secure smartphones and tablets accessing business data.
- ☐ Your IT environment is **well-documented** with network diagrams, asset registers and operating procedures.
- ☐ **Cybersecurity foundations** are solid: MFA, endpoint protection, immutable backup and a tested incident response plan.
- ☐ You have **IT capacity** — budget, people or partner — to deliver change alongside business-as-usual support.

WHAT GOOD LOOKS LIKE

A documented IT estate with a connectivity baseline you can defend, a known-good identity and device posture, Cyber Essentials (ideally Plus) on the wall, and a clear named owner — internal lead or managed partner — with capacity to deliver change beyond keeping the lights on. If your IT team is fully consumed by tickets, transformation projects will starve.

SECTION 01 SCORE _____ / 10

Aim for 8+. Below 6 = infrastructure foundation gap.

02

People & Skills Readiness

Assess whether your team has the skills, the appetite and the support to adopt new technology.

Transformation is a people programme that happens to involve technology — the tools are the easy part. If staff do not have the digital literacy, the training pathway or the leadership air-cover, the rollout will stall regardless of how good the platform is.

- ☐ Staff have **basic digital literacy** — comfortable with email, Office apps and web-based tools.
- ☐ **Champions exist** within each department who are enthusiastic about technology and can support their peers through change.
- ☐ **Training programmes** are in place for new tool rollouts — not just “here is the link, figure it out”.
- ☐ Leadership **actively sponsors** digital initiatives and communicates the vision for change in plain language.
- ☐ IT skills gaps have been **identified and documented** with a plan to close them (*hire, train or partner*).
- ☐ The organisation has experience with **successful technology changes** in the past 2 years — not just procurement, but adoption.
- ☐ Staff **feedback mechanisms** exist to capture concerns and suggestions during technology rollouts.
- ☐ **Resistance to change** has been assessed and a change-management approach is planned, not assumed.

Skills gap snapshot

List the three biggest skills gaps you already know about and the planned action to close each (*e.g. M365 admin, data analysis, security, automation, AI*):

- ☐ **Gap 1:** _____ Plan: _____
- ☐ **Gap 2:** _____ Plan: _____
- ☐ **Gap 3:** _____ Plan: _____

SECTION 02
SCORE

/ 10

Aim for 8+. Below 6 = people / change-management gap.

03

Process & Data Readiness

Assess whether your business processes are documented enough to be improved — and whether your data is clean enough to be useful when you do. Digitising a broken process gives you a faster broken process; reporting from dirty data gives you confident wrong answers. The work here is unglamorous and disproportionately valuable.

- ☐ Core business **processes are documented** and understood — not just held in people's heads.
- ☐ **Data quality** is good — customer records, financial data and operational data are clean and consistent.
- ☐ **Manual processes** that could be automated have been identified and prioritised by effort vs. value.
- ☐ Key business **data is centralised** and accessible — not trapped in silos, spreadsheets or email.
- ☐ There is a clear **data governance policy** covering ownership, quality, security and retention.
- ☐ **Reporting and analytics** needs have been defined — the business knows what data insights it actually wants.
- ☐ Existing **paper-based processes** have been mapped for digitisation, with priority and owner.

PROCESS BEFORE PLATFORM

The single most common transformation failure is buying a platform — CRM, ERP, ticketing — and trying to map the existing process onto it on the way in. The platform will lose. Map the as-is process, agree the to-be process with the people who run it, and only then choose the tool. Process work first, configuration second, training third.

SECTION 03 SCORE / 10

Aim for 8+. Below 6 = process / data gap.

04

Culture & Leadership

Assess organisational culture and leadership commitment. Technology programmes that lack a named sponsor with budget authority, time on their calendar and tolerance for the inevitable mid-programme rough patch will quietly stall — not loudly fail, just stall, until they are dropped. Honest scoring here is the single biggest predictor of transformation success.

Leadership commitment checks

- ☐ Senior leadership has a **clear vision** for how technology will transform the business — not just “we need to digitise”.
- ☐ There is **budget commitment** for digital transformation over a multi-year period, not just a one-off CapEx line.
- ☐ The organisation is willing to **invest in failure** — understanding that not every initiative will succeed.
- ☐ **Cross-departmental collaboration** is normal — departments do not operate as competing silos.
- ☐ **Customer feedback** is actively collected and used to inform technology decisions, not collected and ignored.
- ☐ There is a **dedicated transformation lead** or sponsor with authority and ring-fenced time allocated.
- ☐ The organisation measures **outcomes, not just activity** — focused on business results, not just deploying technology.

THE SINGLE POINT OF FAILURE

If the named transformation sponsor cannot answer the question “what does success look like in 12 months and how will we measure it?” in two sentences, the programme has a single point of failure that no procurement decision will fix. Get clarity on the destination before you choose the vehicle.

SECTION 04 SCORE _____ / 10

Aim for 8+. Below 6 = leadership / sponsorship gap.

05

Strategy & Governance

Assess whether the strategic and governance frameworks are in place to guide transformation. A documented strategy that nobody can find, governance that nobody respects and a roadmap with no milestones is worse than none — it creates the illusion of direction. Lightweight, written, reviewed quarterly is the goal; heavyweight, ceremonial and ignored is the trap.

- ☐ A **digital transformation strategy** is documented — even in draft form — with named outcomes.
- ☐ Clear **success metrics** are defined for transformation initiatives (*revenue, efficiency, customer satisfaction*).
- ☐ A **governance framework** exists for technology decisions — who decides, how projects are approved.
- ☐ **Risk management** considers technology risks alongside business risks — not in a separate IT-only register.
- ☐ Vendor and **partner relationships** are in place to support the transformation journey (*MSP, consultancy, training*).
- ☐ **Compliance requirements** — GDPR, industry regulations — are understood and factored into plans.
- ☐ There is a **roadmap with milestones** rather than a single big-bang transformation plan.

LIGHTWEIGHT BEATS HEAVYWEIGHT

For most UK SMEs the right artefact is a one-page strategy linked to a one-page roadmap with four to six milestones over 12–18 months, owned by a named sponsor and reviewed quarterly. Not a 60-page document signed off once and filed. The strategy you can hold a meeting around is the strategy that gets delivered.

SECTION 05 SCORE _____ / 10

Aim for 8+. Below 6 = strategy / governance gap.



Readiness score summary

Transfer the score for each section into the table. Set a priority (H/M/L) based on the gap to target. Anything below 6 is a candidate for the top-three actions on the next page.

#	READINESS DIMENSION	SCORE / 10	PRIORITY
01	Technology Infrastructure	_____ / 10	☐ H ☐ M ☐ L
02	People & Skills	_____ / 10	☐ H ☐ M ☐ L
03	Process & Data	_____ / 10	☐ H ☐ M ☐ L
04	Culture & Leadership	_____ / 10	☐ H ☐ M ☐ L
05	Strategy & Governance	_____ / 10	☐ H ☐ M ☐ L
Σ	TOTAL READINESS SCORE	_____ / 50	—

Readiness interpretation

40–50

Transformation-ready. Strong foundations across the board. Move to detailed roadmap and pilot delivery.

30–39

Good foundation, gaps exist. Prioritise any dimension below 6 with named owners and deadlines before scaling.

Below 30

Significant gaps. Close foundation gaps before committing to a multi-year programme — seek a specialist readiness review first.



Priority actions & next steps

Translate the scores on the previous page into a small number of decisions. The goal is one page of commitments, not a wish list — three actions, three owners, three deadlines. Re-run this assessment every 6 months and watch the curve.

Top 3 priority actions

01

02

03

Additional notes

Sign-off

ASSESSMENT COMPLETED BY	DATE	APPROVED BY
TRANSFORMATION SPONSOR	NEXT REVIEW DUE	TARGET PROGRAMME WINDOW

Ready to start your digital transformation?

Cloudswitched runs vCIO-led transformation programmes for UK SMEs — readiness review, prioritised roadmap, phased delivery and quarterly steering. Practical, measurable, board-ready.

info@cloudswitched.com
cloudswitched.com/services/it-strategy



CLOUDSWITCHED

STRATEGY, CLOUD, SECURITY & SUPPORT

info@cloudswitched.com

New London House, 6 London St
London EC3R 7LP · United Kingdom