

SISTEMATIKOPH / FREE READINESS TOOL

Business Digital Readiness Checklist

A practical self-assessment for Philippine SMEs and growing teams preparing to replace disconnected spreadsheets, messages, and paper processes.

Organization: _____

Assessment team: _____

Date completed: _____

Use this workbook to assess whether your organization has a clear business case, reliable data, suitable safeguards, realistic integration needs, and the people and budget required for a successful digital project.

This checklist supports an initial conversation. It is not an audit, certification, procurement specification, or guarantee of project success.

How to use this checklist

Bring together the people who own the process, use the current tools, protect the information, and approve changes. Score each statement using evidence rather than assumptions. Add the section scores to obtain your total.

0 - Not ready	1 - Partly ready	2 - Ready
No documented practice, owner, or reliable tool.	Some practice exists but is inconsistent, incomplete, or dependent on individuals.	Documented, owned, consistently followed, and supported by suitable tools.

Scoring guide (maximum: 50)

Total score	Interpretation	Suggested next move
0-16	Foundation needed	Document processes, assign owners, and address critical privacy, security, and data gaps.
17-33	Ready for a focused pilot	Select one high-value, manageable workflow and define success measures.
34-50	Ready for phased implementation	Validate requirements, integration needs, change management, and implementation governance.

1. Business priorities and process clarity

Readiness statement	0	1	2	Notes / evidence
The business problem and desired outcome are stated in measurable terms.	☐	☐	☐	
Current steps, handoffs, approvals, exceptions, and workarounds are documented.	☐	☐	☐	
A process owner can decide rules and approve changes.	☐	☐	☐	
The cost of delays, errors, missed follow-ups, or duplicate work is understood.	☐	☐	☐	
A focused pilot workflow has been selected based on value and feasibility.	☐	☐	☐	

Section score: _____ / 10

2. Customers, operations, and data

Readiness statement	0	1	2	Notes / evidence
Customer, product, service, job, or transaction records have clear owners.	☐	☐	☐	
Required fields, statuses, reports, and performance indicators are defined.	☐	☐	☐	
Duplicate, incomplete, and outdated data have been assessed.	☐	☐	☐	
Existing spreadsheets and files can be mapped and tested before migration.	☐	☐	☐	
The team agrees which system will become the authoritative source after launch.	☐	☐	☐	

Section score: _____ / 10

3. Privacy, security, and continuity

Readiness statement	0	1	2	Notes / evidence
Personal, confidential, and commercially sensitive information is inventoried.	☐	☐	☐	
Access can be limited according to job role and business need.	☐	☐	☐	
Strong authentication, account removal, and administrator controls are planned.	☐	☐	☐	
Backup, recovery, incident response, and business continuity owners are assigned.	☐	☐	☐	
Customer notices, consent or other lawful processing bases, retention, and vendor data access will be reviewed.	☐	☐	☐	

Section score: _____ / 10

4. Technology and integration

Readiness statement	0	1	2	Notes / evidence
User devices, work locations, connectivity, and mobile requirements are documented.	☐	☐	☐	
Accounting, payment, messaging, ecommerce, inventory, or other integrations are identified.	☐	☐	☐	
Required notifications, exports, APIs, and automation rules are prioritized.	☐	☐	☐	
Hosting, performance, availability, and recovery expectations are realistic.	☐	☐	☐	
A technical administrator or dependable support arrangement can be assigned.	☐	☐	☐	

Section score: _____ / 10

5. People, budget, and adoption

Readiness statement	0	1	2	Notes / evidence
A sponsor, project owner, process experts, and end-user representatives are identified.	☐	☐	☐	
Users can participate in validation, testing, training, and early feedback.	☐	☐	☐	
An implementation budget and ongoing support budget are available.	☐	☐	☐	
Success measures and acceptance criteria can be agreed before development.	☐	☐	☐	
A phased rollout, communication, support, and change-request process is planned.	☐	☐	☐	

Section score: _____ / 10

Turn the assessment into an action plan

Choose improvements that reduce risk or remove a recurring operational problem. Start small enough to measure, learn, and adjust.

Priority	Improvement action	Owner	Target date	Success measure
1				
2				
3				
4				
5				

Practical first wins

- Centralize sales inquiries and follow-ups with ownership and next-action dates.
- Track jobs or service requests from intake through assignment, completion, and billing reference.
- Replace one error-prone spreadsheet with a controlled record and dashboard.
- Automate a recurring approval or status notification after the process is standardized.

Important safeguards

- Use real customer or employee data only in approved, secured systems.
- Confirm privacy, retention, security, backup, vendor-access, and account-removal responsibilities.
- Avoid digitizing a broken process unchanged; simplify rules and exceptions before automation.

Next step

Bring your completed checklist to a discovery conversation with SistematikoPH. We can help identify a suitable pilot, clarify requirements, and prepare a phased implementation scope.

sistematikoph.com | Start a conversation through the consultation form on the website