



Supply Chain Digital Transformation Readiness Checklist 2026

Strategic Alignment & Vision

Assessment of digital transformation goals, stakeholder alignment, and integration with overall business objectives and ROI expectations.

Digital Transformation Project Name

Write something...

Primary Strategic Objectives

Write something...

Transformation Priority Level

- ☐ Critical/Immediate
- ☐ High Priority
- ☐ Medium Priority
- ☐ Low Priority/Long-term

Project Commencement Date

Enter date...

Key Stakeholders Involved

- ☐ Executive Leadership
- ☐ IT/Digital Department
- ☐ Operations Management
- ☐ Procurement Team
- ☐ Logistics/Warehouse Leads

Executive Sponsor Approval



Data Infrastructure & Interoperability

Evaluation of current data silos, cloud readiness, API capabilities, and the ability for disparate systems (ERP, WMS, TMS) to communicate seamlessly.

Primary Cloud Infrastructure Type

- ☐ On-Premise
- ☐
- ☐ Public Cloud
- ☐ Private Cloud

Current Integrated Systems

- ☐ ERP (Enterprise Resource Planning)
- ☐ WMS (Warehouse Management System)
- ☐ TMS (Transportation Management System)
- ☐ CRM (Customer Relationship Management)
- ☐ SCM (Supply Chain Planning)

API Connectivity Maturity Level

Write something...

Percentage of Automated Data Entry Processes

Enter a number...

Current Data Architecture Diagram

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Description of Existing Data Silos and Integration Gaps

Write something...

Data Quality & Governance

Verification of data accuracy, standardization protocols, master data management maturity, and real-time data accessibility.

Current Data Maturity Level

- ☐ Manual/Spreadsheet Based
- ☐ Semi-Automated
- ☐ Integrated/Automated
- ☐ Advanced/AI-Driven

Existing Data Governance Frameworks

- ☐ ISO/IEC 38505-1
- ☐ GDPR/Data Privacy Compliance
- ☐ Internal SOPs
- ☐ None Established

Primary Source of Truth (System Name)

Write something...

Estimated Data Error Rate (%)

Enter a number...

Data Cleaning & Standardization Plan

Write something...

Data Governance Policy Document

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Technology Stack & Software Integration

Audit of existing legacy systems, readiness for AI/ML implementation, IoT integration, and compatibility with automated warehouse technologies.

Current ERP Systems in Use

- ☐ SAP S/4HANA
- ☐ Oracle NetSuite
- ☐ Microsoft Dynamics 365
- ☐ Infor CloudSuite
- ☐ Legacy On-Premise ERP
- ☐ Other

Primary Warehouse Management System (WMS) Maturity Level

- ☐ Manual/Spreadsheet Based
- ☐ Basic Digital (Cloud-based)
- ☐ Advanced (Integrated with IoT/Automation)

Integration Gaps Analysis

Write something...

Percentage of Automated Workflows

Enter a number...

Current IT Infrastructure Map

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Last System Integration Audit Date

Enter date...

Cybersecurity & Risk Management

Assessment of end-to-end network security, endpoint protection for IoT devices, data encryption standards, and disaster recovery protocols.

Current Cybersecurity Protocols in Place

- ☐ Multi-Factor Authentication (MFA)
- ☐ End-to-End Data Encryption
- ☐ Regular Penetration Testing
- ☐ Network Segmentation
- ☐ Incident Response Plan

Frequency of Security Audits

- ☐ Quarterly
- ☐ Bi-Annually
- ☐ Annually
- ☐ Ad-hoc / Per Incident

Description of Data Breach Recovery Protocol

Write something...

Upload Latest Cybersecurity Compliance Certificate

 Upload File

Last Security Vulnerability Assessment Date

Enter date...

Number of Unpatched Critical Vulnerabilities Identified

Enter a number...

IT Security Officer Approval

Human Capital & Change Management

Evaluation of workforce digital literacy, training programs for new technologies, organizational culture readiness, and resource allocation for upskilling.

Current Digital Literacy Level

- ☐ Beginner (Manual/Paper-based)
- ☐ Intermediate (Basic Software Usage)
- ☐ Advanced (Data-Driven/Automated)

Required Training Modules

- ☐ New ERP/Software Navigation
- ☐ Data Analytics & Reporting
- ☐ Cybersecurity Awareness
- ☐ Automated Hardware Operation

Change Management Strategy Overview

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Planned Budget for Employee Upskilling

Enter a number...

Training Completion Deadline

Enter date...

Digital Transformation Training Roadmap

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Department Head Approval

Process Automation & Robotics Readiness

Review of manual workflows suitable for RPA (Robotic Process Automation) and physical readiness for autonomous mobile robots (AMRs) or automated sorting.

Current Level of Process Automation

- ☐ Manual/Paper-based
- ☐ Semi-Automated (Partial Digitalization)
- ☐ Highly Automated (Integrated Systems)

Automation Technologies Currently in Use

- ☐ Robotic Process Automation (RPA)
- ☐ Automated Storage and Retrieval Systems (AS/RS)
- ☐ Autonomous Mobile Robots (AMRs)
- ☐ Automated Dimensioning/Weighting Systems
- ☐ Automated Picking/Packing Hardware

Identification of High-Impact Manual Workflows

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Gap Analysis: Challenges preventing full automation adoption

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Estimated Annual Hours Spent on Manual Data Entry

Enter a number...

Existing Warehouse Layout/Automation Blueprint

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Vendor & Ecosystem Connectivity

Assessment of external partner integration, EDI/API capabilities with suppliers, and real-time visibility integration with logistics providers.

Current Integration Method with Primary Suppliers

- ☐ EDI (Electronic Data Interchange)
- ☐ API-based Real-time Integration
- ☐ Email/Manual Portal Upload
- ☐ SFTP/Flat File Transfer
- ☐ No Digital Integration (Manual)

Connected Ecosystem Components

- ☐ Tier 1 Suppliers
- ☐ Logistics Service Providers (LSPs)
- ☐ 3PL/4PL Partners
- ☐ Customs Brokers
- ☐ Last-Mile Carriers

Description of Data Sharing Gaps

Write something...

Supplier Integration Capability Assessment Report

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Next Scheduled Connectivity Audit Date

Enter date...

Percentage of Suppliers Integrated via API/EDI

Enter a number...

Scalability & Future-Proofing

Analysis of whether the digital architecture can support increased transaction volumes, global expansion, and emerging 2026+ supply chain technologies.

Current System Scalability Rating

- ☐ Low (Manual/Legacy)
- ☐ Moderate (Semi-Automated)
- ☐ High (Cloud-Native/Automated)

Identified Growth Bottlenecks

Write something...

Planned Technology Expansion Areas

- ☐ Artificial Intelligence (AI)
- ☐ Internet of Things (IoT)
- ☐ Blockchain/Distributed Ledger
- ☐ Autonomous Robotics
- ☐ Predictive Analytics

Projected Annual Volume Increase (%)

Target Completion Date for Digital Roadmap

Digital Transformation Roadmap Document

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✓ Finish

 Generate Sample Report