

Workforce Tech Readiness Audit

This checklist helps you assess whether your onboarding and workforce processes are ready for automation. It focuses on clarity, ownership, structure and risk, the foundations that determine whether technology will reduce friction or simply digitise existing problems.

It is designed for both staffing and non-staffing organisations and can be completed quickly without technical knowledge.

1. Process clarity

- We have a clearly defined onboarding process for workers, employees or contractors
- There is one agreed "standard" onboarding journey for most scenarios
- Exceptions are intentional and documented, not handled ad hoc
- Each step in the process has a clear owner
- We know where onboarding typically slows down

If several of these are unchecked, automation will likely amplify problems rather than remove them

2. Ownership and accountability

- Every document, approval and check has a named owner
- Escalations are clear when something is missing or delayed
- Responsibility does not rely on shared inboxes or individuals remembering steps
- Teams understand where their role starts and ends
- There is visibility when something is stuck

Lack of ownership is one of the biggest sources of friction and hidden risk

3. Data and document control

- Documents are stored in a single, trusted location
- We can confidently identify the latest and correct version
- Data is captured once and reused where needed
- Key information is structured, not buried in PDFs or emails
- We can quickly retrieve documents for audits or reviews

If data lives in multiple places, automation will struggle to stay reliable





4. Process clarity

- Our current tools are clearly mapped to our processes
- We know which systems are critical and which are workarounds
- Teams are not regularly bypassing systems to get work done
- Reporting reflects reality, not best guesses
- We trust the data we use for decisions

**Disconnected tools often signal process issues, not technology gaps
We can confidently identify the latest and correct version**

5. Ownership and accountability

- Our processes are consistent enough to automate
- Rules and logic are clearly defined
- Edge cases are understood and documented
- Automation would remove effort, not visibility
- We know what success would look like

Automation works best when structure already exists

6. Data and document control

- Our current process would still work at double the volume
- New roles, locations or teams can be added without redesigning everything
- Changes can be made without breaking workflows
- We are not reliant on a few key people to keep things running

The system supports growth, not just today's needs

How to use

Mostly true

Your organisation is likely ready to benefit from automation and optimisation

Mixed results

There are clear opportunities to reduce friction and risk before investing further

Many not true

Focus on fixing structure and clarity before adding more technology