

Digital Transformation Readiness Checklist

Is your institution ready to move beyond disconnected systems?

This quick self-assessment helps leadership teams understand where they stand - and what's needed to modernize confidently.

Institutional Strategy Alignment

- ☐ We have a clearly defined digital transformation strategy at executive level
- ☐ IT goals are aligned with student experience, faculty, and operations goalsOur institution has buy-in from academic and administrative leaders
- ☐ We have identified the business outcomes we expect from transformation (e.g. reduced admin, improved data access)

Current Systems Assessment

- ☐ We rely on more than 3 core systems across student, faculty, and finance operations
- ☐ Our teams use manual workarounds or spreadsheets to complete basic processes
- ☐ Reporting across departments is delayed, duplicated, or unreliable
- ☐ Our current SIS or ERP is more than 10 years old or no longer vendor-supported

Modern Capability Adoption

- ☐ Our systems don't support AI-enabled services, automation, or role-based portals
- ☐ We are unable to scale or adapt quickly to new regulatory or operational demands
- ☐ Staff and faculty need significant training or effort to complete digital tasks
- ☐ We have not defined a roadmap for cloud transition or hybrid service delivery

Data & Integration Readiness

- ☐ We lack a unified view of student, financial, and faculty data
- ☐ There are challenges integrating current systems with newer tools (e.g. Power BI, Teams)
- ☐ Data quality issues are impacting decision-making or reporting accuracy
- ☐ We don't have consistent compliance or audit trail visibility across systems

Your Score

- ☐ 0-6 Checked: You're in early discovery. Start by aligning stakeholders.
- ☐ 7-12 Checked: You're in planning mode. It's time to assess your options.
- ☐ 13+ Checked: You're ready to act. A modular, cloud based solution like Edu365 could support immediate wins.