

Technology Modernization Readiness Assessment

A self-scoring diagnostic for technology leaders

Stern Technology Advisory · sterntechadvisory.com · Morris Stern

How to use this assessment

This assessment is designed to produce an honest picture of your organization's readiness to execute a technology modernization program — before you commit to a vendor, a budget, or a timeline.

Score each item: **0** (not in place), **1** (partially in place), **2** (fully in place).

At the end of each section, tally your score and refer to the interpretation guide. Sections where you score below 60% indicate risk areas that should be addressed before beginning — or accounted for in your program plan.

Section 1 — Strategic clarity

Maximum: 14 points

Statement	Score (0–2)
We have clearly defined the 3–5 business outcomes this modernization must achieve.	
The executive team is aligned on what the program will and will not deliver in the first 24 months.	
We understand why previous technology initiatives in this area fell short.	
We have evaluated whether process or governance changes could solve the problem without new systems.	
Success metrics are defined and measurable — not vague terms like "better visibility" or "improved efficiency."	
There is a named executive sponsor who has allocated time for this program (not just nominal sponsorship).	
The business case has been validated by finance — not just technology.	

Section 1 score: ____ / 14

Section 2 — Technical landscape

Maximum: 16 points

Statement	Score (0–2)
We have documented our current systems landscape, including all major integrations.	

We understand the data flows between systems — what moves, in what direction, at what frequency.	
We have identified legacy systems that will need to run in parallel during transition.	
Technical debt has been catalogued and is factored into the modernization approach.	
Integration dependencies are understood well enough to estimate the integration development scope.	
We have a documented data quality baseline — we know where our master data is clean and where it is not.	
We understand which systems we own vs. which are vendor-managed, and what our contractual flexibility is.	
We have evaluated cloud vs. on-premises considerations based on our operational model, not just cost.	

Section 2 score: ____ / 16

Section 3 — Organizational capacity

Maximum: 16 points

Statement	Score (0–2)
Key IT staff have defined capacity allocated to this program — not expected to run it alongside their full-time jobs.	
Business process owners have been identified and have committed time to the program.	
The organization has completed a large technology program before and understands what it requires.	
We have a realistic view of internal skill gaps and have a plan to address them (hiring, SI support, advisory).	
IT leadership has the authority to make platform and architecture decisions without prolonged committee review.	
There is an agreed escalation path for decisions that cross business unit boundaries.	
We are not planning to run this program while simultaneously executing another major operational change (re-org, acquisition, facility expansion).	
The organization is willing to change processes to fit the new system, not just configure the system to replicate current processes.	

Section 3 score: ____ / 16

Section 4 — Vendor and partner readiness

Maximum: 14 points

Statement	Score (0–2)
We have a documented vendor selection process — not a preference that is being rationalized.	
Reference checks with existing customers are planned independently of the vendor's recommended reference list.	
We have a strategy for managing vendor self-governance during implementation.	
We understand the total cost of ownership — not just license and implementation costs.	
We have evaluated the implementation partner independently of the platform vendor.	
Contract terms address scope change, acceptance criteria, and exit provisions — not just implementation cost.	
We have independent advisory or PMO support that is not the implementation partner.	

Section 4 score: ____ / 14

Section 5 — Change readiness

Maximum: 16 points

Statement	Score (0–2)
A change impact assessment has been conducted — or is planned before implementation begins.	
We have identified the stakeholder groups most affected and understand their concerns.	
There is a communication strategy for the program — not a plan to "announce at go-live."	
Training is planned as a structured program, not a two-day event before launch.	
We have defined adoption metrics that go beyond "training completion."	
Store / field operations leadership is actively engaged in the program — not just notified.	
We have a hypercare and stabilization plan for the first 90 days post go-live.	
There is a documented rollback plan for scenarios where go-live cannot proceed.	

Section 5 score: ____ / 16

Score interpretation

Total score: ____ / 76

61–76

Ready to proceed

Strong foundation.
Address any section
below 70% before vendor
selection.

40–60

Proceed with a plan

Meaningful gaps exist.
Address high-risk sections
before committing to a
vendor timeline.

Below 40

Not ready

Significant unresolved
gaps. A program started
now has high probability
of failure.

Section-level interpretation

For each section, calculate your percentage score:

- **≥80%:** Strong — maintain and monitor
- **60–79%:** Moderate — address gaps before implementation kick-off
- **<60%:** High risk — resolve before proceeding; consider advisory support

What to do with low scores

Low scores in specific sections indicate where your program is most likely to encounter problems — and where pre-program investment will have the highest return.

Section 1 (Strategic clarity) below 60%: Stop. Without clear outcomes and executive alignment, no technology program will succeed. The work to do here is leadership alignment, not vendor selection.

Section 2 (Technical landscape) below 60%: Commission a current-state assessment before issuing an RFP. Vendors will underscope integration work if you do not understand it yourself.

Section 3 (Organizational capacity) below 60%: Replan with realistic resource allocation. Programs that assign key people to "run the project in addition to their regular jobs" fail predictably.

Section 4 (Vendor readiness) below 60%: Slow down the vendor selection process. A fast vendor selection with weak governance structures produces the most expensive outcomes.

Section 5 (Change readiness) below 60%: Bring in change management advisory before implementation begins. Technology adoption failures are almost always change management failures, not technology failures.

About this assessment

This assessment was developed based on patterns observed across retail ERP migrations, store systems transformations, and enterprise technology programs. The dimensions and scoring thresholds reflect what actually determines program success — not theoretical best practices.

If your assessment surfaces significant gaps and you would benefit from an independent perspective on how to address them, Stern Technology Advisory offers a structured advisory engagement to help technology leaders build program readiness before committing to a vendor.

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