

FREE GUIDE

# Manufacturing Transformation Readiness Checklist

25 Questions Every CEO Should Answer  
Before Investing in Digital Transformation

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# Why Most Digital Transformations Fail Before They Start

The manufacturing sector has spent over a decade and hundreds of billions of euros on digital transformation programmes. Yet independent research consistently shows that 60–70% of large-scale transformation initiatives fail to deliver their intended business value.

The problem is rarely the technology. The real problem is that most organisations invest in transformation before they are ready for it.

After 15 years delivering MES/MOM and Industry 4.0 programmes across 30+ manufacturing plants in Europe, I have observed the same pattern repeatedly: companies purchase sophisticated platforms, deploy them at significant cost, and then discover that the underlying conditions for success — strategic clarity, process discipline, data quality, change readiness — were never in place.

This checklist is designed to prevent that outcome. It is not a technology evaluation framework. It is a strategic readiness diagnostic — 25 questions that cut through the noise of vendor promises and analyst hype to assess whether your organisation is genuinely prepared to transform.

Answer these questions honestly. The gaps you find are not weaknesses to hide from the board — they are the most valuable investment thesis you will ever develop.

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# A Framework for Honest Self-Assessment

This checklist is structured across five strategic dimensions: Strategic Alignment, Operational Readiness, Technology & Infrastructure, People & Change Management, and Financial Framework & ROI.

For each of the 25 questions, we recommend a structured scoring approach:

Score	Meaning	Implication
<b>4 — Fully</b>	Clear evidence exists and is documented	Strong foundation — maintain and build
<b>3 — Mostly</b>	Present but not fully formalised	Formalise before scaling investment
<b>2 — Partially</b>	Some progress but significant gaps	Address before deployment begins
<b>1 — No</b>	Not in place or not considered	Critical risk — resolve first

## Interpreting your score (max 100 points):

Total Score	Interpretation
<b>90–100</b>	Transformation-ready. Accelerate investment with confidence.
<b>70–89</b>	Largely ready. Address 3–5 specific gaps before full deployment.
<b>50–69</b>	Partially ready. A structured readiness programme is recommended first.
<b>Below 50</b>	Not ready. Investment at this stage carries significant risk of failure.

We recommend completing this assessment with your full executive team, not as an individual exercise. The divergence in scores between leadership perspectives is often as revealing as the scores themselves.

# Strategic Alignment

*Do you have a clear direction?*

Digital transformation without strategic clarity is expensive experimentation. Before any technology investment, leadership must answer why, what, and for whom the transformation is being executed.

## QUESTION 01

**Is your digital transformation agenda explicitly tied to the company's 3–5 year strategic plan?**

■ *Transformation without business anchoring generates activity, not results.*

Score this: ■ 4 ■ 3 ■ 2 ■ 1

## QUESTION 02

**Can every C-level executive articulate the same definition of 'digital transformation' for your organisation?**

■ *Misaligned definitions lead to fragmented investments and conflicting priorities.*

Score this: ■ 4 ■ 3 ■ 2 ■ 1

## QUESTION 03

**Have you defined clear, measurable success criteria — beyond technology adoption metrics — that reflect P&L; impact?**

■ *KPIs should speak the language of the boardroom, not the IT department.*

Score this: ■ 4 ■ 3 ■ 2 ■ 1

## QUESTION 04

**Is there a dedicated transformation governance structure — with executive sponsorship and decision-making authority — in place?**

■ *Without governance, transformation stalls at the first budget cycle.*

Score this: ■ 4 ■ 3 ■ 2 ■ 1

**QUESTION 05**

**Have you mapped the competitive landscape to understand how digital maturity gaps affect your market position today?**

■ *The cost of inaction is often invisible — until it's catastrophic.*

Score this: ■ 4 ■ 3 ■ 2 ■ 1

# Operational Readiness

*Can your operations absorb the change?*

Technology deployments fail when the operational foundation is unprepared. Process discipline, data quality, and shop-floor visibility are prerequisites — not outcomes — of a successful transformation.

## QUESTION 06

**Do you have reliable, real-time visibility into OEE, scrap rates, and throughput across your key production sites?**

■ *You cannot optimise what you cannot measure — and most plants measure far less than they think.*

Score this: ■ 4 ■ 3 ■ 2 ■ 1

## QUESTION 07

**Are your core manufacturing processes standardised and documented to a level that supports digital replication?**

■ *Digitising a broken process creates a faster broken process.*

Score this: ■ 4 ■ 3 ■ 2 ■ 1

## QUESTION 08

**Have you conducted a formal digital maturity assessment across your plant network in the last 18 months?**

■ *Maturity gaps vary enormously between sites — a single roadmap rarely fits all.*

Score this: ■ 4 ■ 3 ■ 2 ■ 1

## QUESTION 09

**Do you have a data governance framework that ensures production data is accurate, consistent, and actionable?**

■ *The ROI of AI and analytics is only as good as the data feeding it.*

Score this: ■ 4 ■ 3 ■ 2 ■ 1

**QUESTION 10**

**Are your IT and OT teams operating with a shared architecture roadmap, or in separate strategic silos?**

■ *IT/OT misalignment is the single biggest technical bottleneck in manufacturing transformation.*

Score this: ■ 4 ■ 3 ■ 2 ■ 1

# Technology & Infrastructure

*Is your tech stack ready to scale?*

Technology selection is the most visible — and often most debated — dimension of transformation. But the right question is not which platform to buy; it is whether your infrastructure can sustain what you intend to build.

**QUESTION 11**

**Does your current ERP/MES/SCADA landscape support horizontal integration across sites, or does each plant operate as a digital island?**

■ *Fragmented architectures compound costs and delay ROI at every subsequent rollout.*

Score this: ■ 4 ■ 3 ■ 2 ■ 1

**QUESTION 12**

**Have you defined a cloud strategy that balances latency requirements at the edge with scalability in the cloud?**

■ *Not everything belongs in the cloud — and not knowing the difference is expensive.*

Score this: ■ 4 ■ 3 ■ 2 ■ 1

**QUESTION 13**

**Is your cybersecurity posture strong enough to protect operational technology environments connected to corporate networks?**

■ *OT/IT connectivity is the fastest-growing attack surface in industrial companies.*

Score this: ■ 4 ■ 3 ■ 2 ■ 1

**QUESTION 14**

**Do you have a vendor consolidation strategy, or are you accumulating point solutions that create integration debt?**

■ *Every standalone tool adds maintenance burden and reduces data coherence.*

Score this: ■ 4 ■ 3 ■ 2 ■ 1

**QUESTION 15**

**Have you evaluated AI and machine learning use cases against actual data availability and quality in your facilities?**

■ *AI pilots that fail in production almost always fail because of data readiness, not algorithms.*

Score this: ■ 4 ■ 3 ■ 2 ■ 1

# People & Change Management

*Will your organisation follow the strategy?*

Technology is the smallest variable in transformation failure. Culture, capability, and change resistance account for the majority of derailed programmes. The gap between digital leaders and laggards is change management capability — not technology.

## QUESTION 16

**Does your workforce have a documented digital skills roadmap that addresses current gaps and future capability requirements?**

■ *Transformation without capability-building creates tool adoption without business impact.*

Score this: ■ 4 ■ 3 ■ 2 ■ 1

## QUESTION 17

**Is your middle management layer aligned with — and actively advocating for — the transformation agenda?**

■ *Frontline resistance almost always originates from uncommitted middle management.*

Score this: ■ 4 ■ 3 ■ 2 ■ 1

## QUESTION 18

**Do you have a structured change management methodology embedded in your transformation programme — not treated as an afterthought?**

■ *Change management is not a communications plan. It is a programme in itself.*

Score this: ■ 4 ■ 3 ■ 2 ■ 1

## QUESTION 19

**Have you defined clear ownership of digital transformation outcomes at the plant/site manager level?**

■ *What is everyone's responsibility is no one's responsibility.*

Score this: ■ 4 ■ 3 ■ 2 ■ 1

**QUESTION 20**

**Is there a mechanism for shop-floor operators to provide feedback on digital tools — and for that feedback to influence deployment decisions?**

■ *The people closest to the process hold the highest-value insights. Most organisations never ask them.*

Score this: ■ 4 ■ 3 ■ 2 ■ 1

# Financial Framework & ROI

*Will the investment deliver returns?*

Every transformation investment competes for capital. A rigorous financial framework — built before, not after, the business case — is the difference between a programme that gets funded once and one that scales across the enterprise.

## QUESTION 21

**Have you quantified the cost of your current operational inefficiencies as a baseline for your ROI model?**

■ *Without a credible baseline, transformation ROI is fiction — and the board knows it.*

Score this: ■ 4 ■ 3 ■ 2 ■ 1

## QUESTION 22

**Is your investment horizon for digital transformation aligned with realistic value realisation timelines (typically 18–36 months)?**

■ *Transformations killed by short ROI expectations are the manufacturing sector's most common failure mode.*

Score this: ■ 4 ■ 3 ■ 2 ■ 1

## QUESTION 23

**Do you have a total cost of ownership model that includes integration, change management, training, and ongoing maintenance — not just licence fees?**

■ *The purchase price is rarely more than 30% of the real cost of deployment.*

Score this: ■ 4 ■ 3 ■ 2 ■ 1

## QUESTION 24

**Are you tracking value realisation from digital investments with the same rigour as capex projects?**

■ *Accountability without measurement is aspiration. Measurement without accountability is reporting.*

Score this: ■ 4 ■ 3 ■ 2 ■ 1

**QUESTION 25**

**Have you built contingency into your transformation budget for scope evolution, integration complexity, and organisational friction?**

■ *Transformations that hit budget on day one will exceed it by day 90 — plan for reality.*

Score this: ■ 4 ■ 3 ■ 2 ■ 1

# Record Your Assessment

#	Question Summary	Score (1-4)	Priority Action
1	Transformation tied to 3-5 year strategy		
2	Shared executive definition of transformation		
3	Measurable P&L success criteria defined		
4	Transformation governance structure in place		
5	Competitive digital maturity gap mapped		
6	Real-time OEE/scrap/throughput visibility		
7	Core processes standardised and documented		
8	Digital maturity assessment completed		
9	Data governance framework in place		
10	IT/OT shared architecture roadmap exists		
11	Cross-site ERP/MES/SCADA integration		
12	Cloud strategy balancing edge and scale		
13	OT cybersecurity posture assessed		
14	Vendor consolidation strategy defined		
15	AI/ML use cases validated vs data quality		
16	Digital skills roadmap documented		
17	Middle management aligned and advocating		
18	Structured change management methodology		
19	Plant-level ownership of digital outcomes		
20	Operator feedback mechanism for digital tools		
21	Operational inefficiency baseline quantified		
22	Investment horizon aligned to 18-36 months		
23	Total cost of ownership model built		
24	Value realisation tracked with rigour		
25	Transformation budget includes contingency		

Total Score: \_\_\_\_\_ / 100 Date of Assessment: \_\_\_\_\_ Completed by: \_\_\_\_\_

# From Diagnosis to Transformation

Identifying gaps is the first — and most important — step. The value of this checklist is not in the score; it is in the structured conversation it creates between your leadership team.

Once you have completed your assessment, the recommended path forward depends on your score range. Scores above 70 indicate you are ready to accelerate investment in targeted areas. Scores between 50 and 69 suggest a structured readiness programme should precede large-scale deployment. Scores below 50 indicate that foundational work — process, data, governance — must come first.

The most common and costly mistake is to skip this diagnostic phase entirely. Organisations that invest in readiness before deployment consistently achieve faster ROI, lower integration costs, and higher user adoption than those that do not.

## Ready to Go Further?

If your assessment has surfaced critical gaps — or if you want an independent perspective on your transformation readiness — I offer executive advisory sessions designed specifically for CEOs and COOs navigating complex industrial transformation programmes.

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# Jacobo Lloret Casal

Jacobo Lloret Casal is Founder & CEO of Industry Disruptors Lab and a leading voice in manufacturing transformation. With over 15 years of experience in manufacturing operations and digital transformation, he has led large-scale MES/MOM programmes across 30+ plants in Europe, delivering measurable improvements in efficiency, traceability, and operational profitability.

He has shaped and delivered digital portfolios worth €10–15M and influenced over €5M+ in new business pipeline across the EMEA region. His work spans architecture design, executive advisory, consultative sales, and delivery governance — bridging the gap between shop-floor reality and boardroom strategy.

Jacobo is the founder of Industry Disruptors Lab, a global platform dedicated to challenging conventional thinking in manufacturing transformation. Through interviews, content, and thought leadership, the Lab connects CEOs, COOs, and operations leaders who believe that the future of manufacturing belongs to those willing to question the present.

His content reaches thousands of industrial professionals across Europe and Latin America, and he is recognised as a voice of influence in the MES/MOM and Industry 4.0 ecosystem.

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