Operational Readiness Checklist

A practical worksheet for confirming whether a team, process, technology, or commercialization initiative is ready to move from plan to execution

Use this checklist before launching a pilot, implementing a new process, scaling a commercialization effort, adopting AI or operational technology, entering a customer-facing rollout, or moving from grant-funded development into real-world operations. The goal is to identify readiness gaps early, assign owners, and prevent execution risk from being discovered too late.

How to Use This Checklist

- Complete the summary snapshot first so the team agrees on the operational decision being evaluated.
- Score each readiness area using the 1-5 scale. A low score does not automatically stop a project, but it should trigger an action plan.
- Use the checkbox sections to document concrete evidence, not just optimism or verbal agreement.
- Convert unresolved gaps into owners, deadlines, and proof-of-completion expectations before launch.
- Revisit the checklist before each major implementation gate, pilot review, funding milestone, customer handoff, or scale-up decision.

1. Readiness Summary Snapshot

Complete this section before the checklist review meeting. The purpose is to define what is being evaluated and what decision the team needs to make.

Project / initiative name		**Review date**	
Primary sponsor / leader		**Operational owner**	
Readiness decision being evaluated		**Target launch / go-live date**	
Current stage	☐ Planning ☐ Pilot ☐ Launch ☐ Scale ☐ Recovery	**Primary users / customers**	
Overall readiness rating	☐ Ready ☐ Ready with conditions ☐ Not ready	**Top operational risk**	
Next review date		**Prepared by**	

2. Readiness Scoring Guide

Use the same scoring method across every domain so leadership can compare readiness areas quickly and consistently.

Score	Readiness Level	Meaning
1	Not ready	Major gaps are unresolved. Launching now would likely create avoidable failure, rework, compliance risk, customer frustration, or operational disruption.
2	Partially ready	Some foundations exist, but important requirements, owners, data, training, workflow changes, or support mechanisms are

		incomplete.
3	Conditionally ready	Core elements are in place, but several gaps require mitigation, monitoring, or staged rollout controls.
4	Ready	The area is sufficiently prepared for launch, with minor gaps that have owners and realistic completion dates.
5	Highly ready	The area is well-prepared, evidence-backed, tested, resourced, and supported by clear ownership and escalation paths.

3. Operational Readiness Domain Scorecard

Score each area and summarize the evidence behind the score. Use this as the executive dashboard for the readiness review.

Readiness Area	Score / Status	Evidence Reviewed	Main Gap / Action	Owner / Due Date
Leadership alignment & decision authority	Score: ___ Status: ___			
Workflow and process readiness	Score: ___ Status: ___			
People, roles, and staffing	Score: ___ Status: ___			
Training and adoption readiness	Score: ___ Status: ___			
Data, systems, and integrations	Score: ___ Status: ___			
Customer / user support readiness	Score: ___ Status: ___			
Compliance, security, and risk controls	Score: ___ Status: ___			
Measurement, reporting, and feedback loops	Score: ___ Status: ___			
Budget, capacity, and vendor readiness	Score: ___ Status: ___			
Contingency planning and escalation	Score: ___ Status: ___			

4. Detailed Checklist

Mark each item as complete, in progress, not started, or not applicable. Add notes when an item is incomplete or when the evidence is weak.

Leadership, Governance, and Decision Authority

Checklist Item	Complete	In Progress	Not Started	Notes / Evidence	Owner
Executive sponsor is identified and actively engaged.	☐	☐	☐		
Operational owner has authority to make day-to-day implementation decisions.	☐	☐	☐		
Decision rights are	☐	☐	☐		

clear for scope changes, budget, vendors, customer commitments, and launch timing.					
Cross-functional stakeholders agree on the purpose, timeline, and success criteria.	☐	☐	☐		
Escalation path is documented for unresolved blockers or urgent risks.	☐	☐	☐		

Workflow and Process Readiness

Checklist Item	Complete	In Progress	Not Started	Notes / Evidence	Owner
Current workflow has been mapped at the level needed for implementation.	☐	☐	☐		
Future-state workflow is documented and realistic for the operating environment.	☐	☐	☐		
Handoffs between teams, systems, vendors, and customers are defined.	☐	☐	☐		
Known bottlenecks, dependencies, and manual workarounds have been identified.	☐	☐	☐		
Standard operating procedures or working instructions are drafted where needed.	☐	☐	☐		

People, Roles, and Capacity

Checklist Item	Complete	In Progress	Not Started	Notes / Evidence	Owner
Required roles are identified, including backup owners for critical functions.	☐	☐	☐		
Staffing capacity is sufficient for launch and early support.	☐	☐	☐		
Role changes or new responsibilities have been communicated to affected teams.	☐	☐	☐		
Internal experts, consultants, or	☐	☐	☐		

vendors are available when needed.					
The team has a realistic plan for peak workload or launch-week support.	☐	☐	☐		

Training, Adoption, and Communication

Checklist Item	Complete	In Progress	Not Started	Notes / Evidence	Owner
User groups are segmented by role, workflow impact, and training need.	☐	☐	☐		
Training materials, job aids, onboarding content, or user instructions are prepared.	☐	☐	☐		
Key stakeholders understand what will change and why it matters.	☐	☐	☐		
Adoption risks, resistance points, or usability concerns have been documented.	☐	☐	☐		
Feedback channels are available during pilot, launch, and early operation.	☐	☐	☐		

Data, Systems, and Technical Readiness

Checklist Item	Complete	In Progress	Not Started	Notes / Evidence	Owner
Required data sources are identified and accessible.	☐	☐	☐		
Data quality issues, missing fields, duplicates, or ownership gaps have been reviewed.	☐	☐	☐		
Systems, integrations, permissions, and user access requirements are understood.	☐	☐	☐		
Testing has been completed for the most important workflows and edge cases.	☐	☐	☐		
Technical support and troubleshooting responsibilities are	☐	☐	☐		

assigned.					

Risk, Compliance, and Security

Checklist Item	Complete	In Progress	Not Started	Notes / Evidence	Owner
Compliance requirements, privacy considerations, IP concerns, or security needs have been reviewed.	☐	☐	☐		
High-impact operational risks are documented with mitigation plans.	☐	☐	☐		
Approval requirements are known for legal, regulatory, institutional, customer, or grant-related constraints.	☐	☐	☐		
Failure scenarios have been considered, including rollback or pause conditions.	☐	☐	☐		
Sensitive information, customer data, and user access controls have been addressed.	☐	☐	☐		

Measurement and Performance Management

Checklist Item	Complete	In Progress	Not Started	Notes / Evidence	Owner
Success metrics are defined and tied to the decision the team needs to make.	☐	☐	☐		
Baseline measures are available or a plan exists to establish them.	☐	☐	☐		
Reporting cadence and metric owners are documented.	☐	☐	☐		
Pilot or launch review meetings are scheduled.	☐	☐	☐		
The team has defined what evidence would support continuation, redesign, scale-up, or stop/pause.	☐	☐	☐		

5. Critical Gap Register

List the gaps that must be resolved, mitigated, or explicitly accepted before launch. This section should become the practical action list after the readiness review.

Gap / Risk	Readiness Area	Impact H/M/L	Required Action	Owner	Due Date	Launch Decision Impact

6. Launch / Go-Live Decision

Use this section to document the final readiness decision and any conditions that must be met before proceeding.

Decision	☐ Proceed ☐ Proceed with conditions ☐ Delay ☐ Redesign / return to planning
Conditions for proceeding	
Items that can be resolved after launch	
Items that must be resolved before launch	
Final decision owner and date	

7. 30-Day Readiness Action Plan

Translate the review into a short operating plan. Focus on the highest-risk items and the actions most likely to improve launch success.

Action Item	Readiness Gap Addressed	Evidence of Completion	Owner	Due Date	Status

Notes

Need help applying this tool? ScienceDocs supports commercialization, change management, AI adoption, grant strategy, and operational optimization.