



A DIAGNOSTIC TOOL FOR PE-BACKED AND PRIVATELY-OWNED
BUSINESSES

Technology DD Readiness Scorecard

A structured self-assessment across six pillars of technology readiness.

SIX PILLARS · 30 QUESTIONS · 20 MINUTES TO
COMPLETE

Score out of 150. Interpret against the readiness bands on page 3.

Prepared by The Clarity Partnership

Interim CTO/CIO Services for Businesses at Inflection Points

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HOW TO USE THIS SCORECARD

This scorecard is a self-assessment diagnostic for evaluating a business's technology readiness across six pillars. It is designed to be honest, actionable, and useful across three common use cases:

For Portco CEOs, CFOs, and technology leaders

Use the scorecard as an honest self-assessment. Score your business against each question with the reality of daily operations in mind — not the aspiration written in policy documents. The output is a defensible starting point for internal conversations about where to invest attention next.

For PE Operating Partners

The scorecard is designed to be applied consistently across a portfolio. Running it against multiple portcos surfaces the priority interventions and enables portfolio-level comparison. The scoring criteria are the same questions buyers ask in technology due diligence.

For recruiters, advisers, and interim network partners

The scorecard is a structured conversation-starter for client discussions about interim CTO/CIO or fractional leadership engagement. Share freely with clients — the tool is provided as an industry contribution, not a sales artefact.

Method

Thirty questions across six pillars. Score each question on a 1 to 5 scale. Total per pillar out of 30, combined total out of 150. Interpretation bands on the following page. Allow approximately 20 minutes to complete honestly.

Score honestly. A defensively-high score defeats the purpose of the exercise — the value is in identifying where the gaps are, not confirming the story management already tells itself.

SCORING GUIDE

How to score each question

Every question uses the same 1 to 5 scale. Score against what actually happens in practice, not what a policy document says should happen.

1	No — not in place, or not functioning
2	Partial or informal — some awareness, no structure
3	Working, some gaps — functional but not defensible under scrutiny
4	Solid, documented — would stand up to buyer or board review
5	Excellent, industry-leading — a genuine strength of the business

Readiness bands — how to interpret your total score

When you complete the assessment, total your score across all six pillars. The band you fall into indicates the appropriate next steps:

120 – 150	STRONG	Well-positioned. Technology is a strength, not a risk. Maintain the discipline; consider periodic re-assessment.
90 – 119	ADEQUATE	Broadly ready with specific gaps to close. Targeted interventions likely to yield material improvement.
60 – 89	AT RISK	Meaningful risk across multiple pillars. A structured technology audit and remediation plan is worth commissioning.
Below 60	URGENT	Multiple areas require immediate attention. An exit, transaction, or transformation with the estate in this state carries significant risk.

Reading individual pillar scores

The total is useful for a headline, but the pillar-by-pillar breakdown is where the actionable insight sits. A pillar scoring 12/30 or below indicates a specific area needing attention, even if the overall total looks adequate. Two or more pillars below 15/30 usually indicates the need for interim technology leadership.

Pillar 01 Technology Landscape & System Architecture

How clearly is the technology estate understood, documented, and controlled? This pillar assesses whether the business has a defensible picture of its systems, their purpose, their dependencies, and their evolution.

Scoring: 1 = No — not in place · 2 = Partial or informal · 3 = Working, some gaps · 4 = Solid, documented · 5 = Excellent, industry-leading

1. Is there a current, accurate inventory of all business-critical systems, including ownership and purpose?

Score: ☐ 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5

2. Do documented architecture diagrams exist for the core business systems, showing how they connect?

Score: ☐ 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5

3. Are the roles of your systems clear — for example, which is the source of truth for customer, product, and financial data?

Score: ☐ 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5

4. Has the technology estate been simplified over the last 24 months (retiring legacy, consolidating overlap), rather than growing organically?

Score: ☐ 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5

5. Is architecture decision-making a structured process with clear ownership, rather than department-led or vendor-led?

Score: ☐ 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5

6. Would a buyer, board, or advisor be able to understand the shape of the estate from your documentation without needing verbal explanation?

Score: ☐ 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5

Pillar 01 Total: _____ / 30

Pillar 02 Integration & Automation

How reliable, documented, and monitored are the integrations that connect the business? This pillar assesses the plumbing that keeps operations flowing between systems — often the most fragile and least-visible layer.

Scoring: 1 = No — not in place · 2 = Partial or informal · 3 = Working, some gaps · 4 = Solid, documented · 5 = Excellent, industry-leading

1. Are all business-critical integrations documented, including data flows, transformation logic, and error-handling rules?

Score: ☐ 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5

2. Do you know which integrations would cause immediate business disruption if they failed?

Score: ☐ 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5

3. Are integration errors actively monitored, alerted, and investigated — rather than surfacing only when a user complains?

Score: ☐ 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5

4. Is there a named owner for each critical integration or automation, with a clear escalation path?

Score: ☐ 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5

5. Are integrations version-controlled and change-managed, rather than modified ad-hoc by whoever is closest to the problem?

Score: ☐ 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5

6. Could you demonstrate to a buyer or advisor that the integration layer is well-controlled, not held together informally?

Score: ☐ 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5

Pillar 02 Total: _____ / 30

Pillar 03 Governance, Decision-Making & Ownership

Who makes technology decisions, on what basis, and with what visibility? This pillar assesses whether the business has appropriate governance for its stage and scale — enough to enable delivery, not so much that it slows the business down.

Scoring: 1 = No — not in place · 2 = Partial or informal · 3 = Working, some gaps · 4 = Solid, documented · 5 = Excellent, industry-leading

1. Is there a defined technology decision-making process, with clarity on who approves what?

Score: ☐ 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5

2. Do you know the total annual technology spend across the business, including departmental SaaS purchases (not just the IT budget)?

Score: ☐ 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5

3. Are new technology purchases evaluated centrally, or does each department buy tools independently?

Score: ☐ 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5

4. Does technology have a strategic voice at leadership level, or is it treated purely as a cost centre?

Score: ☐ 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5

5. Are technology risks reviewed regularly by the executive team, with clear ownership and resolution timelines?

Score: ☐ 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5

6. Would a buyer or investor be reassured by how technology decisions are made and documented in your business?

Score: ☐ 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5

Pillar 03 Total: _____ / 30

Pillar 04 Security, Access & Compliance

How defensible is the security posture, and how well is it maintained in practice? This pillar assesses both the policy framework and the reality of day-to-day access, offboarding, and compliance.

Scoring: 1 = No — not in place · 2 = Partial or informal · 3 = Working, some gaps · 4 = Solid, documented · 5 = Excellent, industry-leading

1. Are the core security policies (Information Security, Incident Management, Third Party Risk, AI Usage) documented, current, and applied in practice?

Score: ☐ 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5

2. Is admin and privileged access reviewed regularly, with a defensible process for granting and revoking access?

Score: ☐ 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5

3. Do you have a documented and rehearsed incident response process, with named responsibilities?

Score: ☐ 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5

4. Is offboarding of leavers structured and prompt, with all access removed within an audited timeframe?

Score: ☐ 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5

5. Is device management (laptops, mobiles, admin machines) coordinated centrally, rather than left to individuals or departments?

Score: ☐ 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5

6. Could you demonstrate compliance with the security expectations of your customers, suppliers, and — if relevant — regulators?

Score: ☐ 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5

Pillar 04 Total: _____ / 30

Pillar 05 Training, Adoption & Ways of Working

How consistently are systems adopted and used across the business? This pillar assesses whether the technology actually delivers its intended value — a common gap between what is deployed and what is used.

Scoring: 1 = No — not in place · 2 = Partial or informal · 3 = Working, some gaps · 4 = Solid, documented · 5 = Excellent, industry-leading

1. Does onboarding embed core systems consistently, so that new joiners are productive quickly?

Score: ☐ 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5

2. Is there structured, current training content for the systems the business relies on — accessible when needed?

Score: ☐ 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5

3. Is system adoption consistent across teams, or do you see variability in how (or whether) tools are used?

Score: ☐ 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5

4. Are your communication tools rationalised (clear defaults for where different types of conversation happen), or fragmented?

Score: ☐ 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5

5. Is there a clear support pathway when systems don't work, that people actually use?

Score: ☐ 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5

6. Do you have visibility of adoption metrics — are the tools you have deployed actually being used?

Score: ☐ 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5

Pillar 05 Total: _____ / 30

BEYOND SCORING — THE STORY FOR CHANGE

The strongest predictor of adoption success in change programmes is not training material or communication channels. It is whether the story for change — the why — is clear, embodied, and consistently lived by senior sponsors and change leaders. This matters most when teams are asked to hold two jobs at once (their regular role plus a project role). Where the leadership narrative is clear and visible, discretionary effort is high and holds. Where it wavers, or where a single senior comment undermines it, buy-in collapses fast and takes months to rebuild. This is a judgement question, not a scored one — but if you cannot answer it with confidence, it is often the first thing to fix.

Pillar 06 AI Readiness & Opportunity

Where does the business stand on AI — as a capability, as a policy question, and as a source of measurable value? This pillar assesses both readiness (governance and data) and opportunity (specific commercial use cases).

Scoring: 1 = No — not in place · 2 = Partial or informal · 3 = Working, some gaps · 4 = Solid, documented · 5 = Excellent, industry-leading

1. Is there a documented AI Usage Policy that has been reviewed and approved by leadership?

Score: ☐ 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5

2. Do employees have clear guidance on which AI tools they can use, for what purposes, and with what data?

Score: ☐ 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5

3. Have specific AI use cases been identified for the business, with commercial value quantified and owners named?

Score: ☐ 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5

4. Is your business data ready for AI adoption — accessible, structured, and of sufficient quality to be useful?

Score: ☐ 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5

5. Are there any AI-enabled improvements already delivered, with documented outcomes (efficiency gains, revenue impact, or capacity release)?

Score: ☐ 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5

6. Could you give a buyer, board, or investor a defensible answer to the question: what is your position on AI, and what value is it creating?

Score: ☐ 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5

Pillar 06 Total: _____ / 30

TOTAL SCORE & NEXT STEPS

Your total score

Pillar 1 — Technology Landscape & System Architecture _____ / 30

Pillar 2 — Integration & Automation _____ / 30

Pillar 3 — Governance, Decision-Making & Ownership _____ / 30

Pillar 4 — Security, Access & Compliance _____ / 30

Pillar 5 — Training, Adoption & Ways of Working _____ / 30

Pillar 6 — AI Readiness & Opportunity _____ / 30

TOTAL _____ / 150

What your score suggests

Refer to the readiness bands on page 3. Your total score points to the broad state of technology readiness; the individual pillar scores show where the gaps sit. Two or more pillars below 15/30 usually indicates the need for interim technology leadership.

Common next steps by band

- 120 – 150 (Strong): Maintain the discipline. Consider periodic re-assessment (annually, or ahead of a transaction).
- 90 – 119 (Adequate): Prioritise the lowest-scoring pillars. Targeted interventions typically move a business from Adequate to Strong within 6-12 months.
- 60 – 89 (At Risk): Commission a structured technology audit to convert this diagnostic into a specific remediation plan with owners, timelines, and cost estimates.
- Below 60 (Urgent): Interim technology leadership is likely to be the fastest route to stabilisation. If an exit, transaction, or transformation is in the next 18 months, act now.

For a structured discussion of your score

The Clarity Partnership provides interim CTO/CIO leadership and structured technology audits for PE-backed and privately-owned businesses. For a conversation about your score and what to do next, contact us using the details below.

There is no obligation, no sales sequence, and no fee for an initial discussion. The scorecard is provided as an industry contribution — if it is useful, we're glad. If it prompts a conversation, that is a bonus for both sides.



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This scorecard is provided as an industry contribution and may be shared freely.