

Getting Started Guide

Free Technology Assessment Tools

4 tools. 2 hours. Complete clarity on your technology health.

Why These Tools?

Most organisations know something isn't right with their technology, but can't pinpoint exactly what. These four tools give you a structured way to assess your situation without needing consultants, expensive software, or months of analysis.

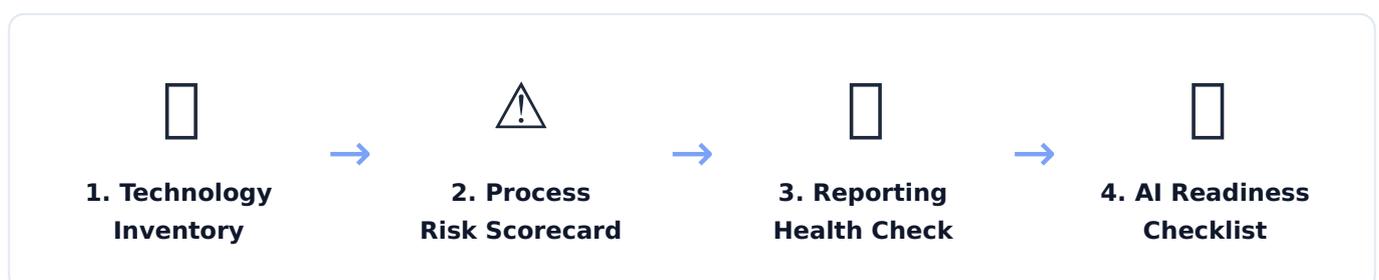
What you'll discover:

- Which tools are costing money but delivering little value
- Where your biggest operational risks are hiding
- Whether you're ready for AI — or need foundations first
- Which reports people actually trust (and which they don't)

Total time investment: Approximately 2 hours across all four tools, spread however you like.

Recommended Sequence

Work through the tools in this order for the clearest picture:



Why this order? The Technology Inventory establishes what you have. The Risk Scorecard identifies where things break. The Reporting Health Check reveals data trust issues. Finally, the AI Readiness Checklist tells you if you're ready for the next step — or if you need to fix foundations first.

Tool 1: Technology Inventory Template

🕒 30-45 minutes

What It Does

Creates a complete catalogue of every technology tool your organisation uses — including the "shadow IT" that lives outside official systems.

How to Complete It

1

Gather Your Sources

Pull your credit card statements, subscription lists, and ask department heads what tools their teams use. Don't forget mobile apps, browser extensions, and that spreadsheet someone built that everyone relies on.

2

Fill In Each Row

For each tool, capture: name, category, what it does, monthly cost, who owns it, how many people use it, what it connects to, and what data lives there. If you don't know something, write "Unknown" — that's valuable information too.

3

Mark the Status

Be honest: is this tool Active, Underused, Redundant, Being Replaced, or Unknown? Underused tools are often the biggest hidden cost.

4

Review the Summary

The template auto-calculates your total technology spend. Most organisations are surprised by this number.

✓ **What You'll Have**

A single view of your entire technology landscape with costs, owners, and honest status assessments. This alone often reveals 10-20% of tools that could be consolidated or eliminated.

Common Mistake: Only listing "official" tools. The real value comes from including the spreadsheets, personal subscriptions, and unofficial tools that actually run your business.

Tool 2: Process Risk Scorecard

🕒 30-45 minutes

What It Does

Identifies which business processes are most at risk of failure — before they actually fail. Scores processes across five dimensions to create a prioritised risk register.

How to Complete It

1

List Your Critical Processes

Start with the pre-populated list (financial close, customer onboarding, etc.) and add any processes specific to your business. Focus on processes that, if broken, would cause real pain.

2

Score Each Dimension (1-5)

Use the Scoring Guide sheet to rate each process on: Fragility, Documentation, Key Person Risk, Data Quality, and Automation Level. Be honest — optimistic scoring defeats the purpose.

3

Review Auto-Calculated Priorities

The scorecard automatically calculates a risk score and assigns a priority: Critical (fix now), High (30 days), Medium (plan for), or Low (monitor).

4

Add Mitigation Notes

For high-risk processes, note what would reduce the risk. This becomes your action list.

✓ **What You'll Have**

A prioritised list of process risks with clear scores. You'll know exactly which processes need attention first and why.

Common Mistake: Scoring processes how you want them to be, not how they actually are today. Score current state, not aspirational state.

Tool 3: Reporting Health Check

🕒 20-30 minutes

What It Does

Assesses the health of your reporting ecosystem — revealing which reports people actually trust and which are "check the box" exercises that nobody believes.

How to Complete It

1

List Your Key Reports

Include everything: dashboards, weekly summaries, board packs, operational reports. If someone produces it regularly and others consume it, list it.

2

Capture Report Details

For each report: frequency, who creates it, who reads it, where the data comes from, and how long it takes to produce. The "creation time" field often reveals hidden inefficiency.

3

Assign Trust Levels (1-5)

This is the critical field. Score honestly: 5 = gold standard everyone trusts, 1 = nobody believes these numbers. Ask the report consumers, not the creators.

4

Complete the Diagnostic

Use the Diagnostic sheet to answer questions about data accuracy, timeliness, usability, and sustainability. This reveals systemic issues.

✓ **What You'll Have**

A clear view of your reporting health with trust levels exposed. You'll see which reports need fixing and which might not be needed at all.

Common Mistake: The report creator rates trust level as high; the consumers rate it as low. Always ask the people who receive the report, not the people who make it.

Tool 4: AI Readiness Checklist

🕒 15-20 minutes

What It Does

Determines whether your organisation is ready to benefit from AI — or whether you need to fix foundations first. Prevents wasted investment on AI initiatives that fail due to poor data or immature processes.

How to Complete It

1

Answer All 25 Questions

Work through each section: Data Foundations, Process Maturity, Technology Readiness, Organisational Readiness, and Use Case Clarity. Score 0 (No), 1 (Partial), or 2 (Yes) for each.

2

Review Section Totals

Each section scores out of 10. Low section scores reveal specific gaps — e.g., strong technology but weak data foundations means you're not ready despite having good systems.

3

Check Your Overall Score

The total (out of 50) determines your readiness level: 40+ = ready for pilots, 30-39 = address gaps first, 20-29 = focus on foundations, below 20 = AI shouldn't be the priority.

4

Identify Your Weakest Section

Your lowest-scoring section is where to focus before any AI investment. AI built on weak foundations will fail.

✓ What You'll Have

A clear, scored assessment of AI readiness with specific gaps identified. You'll know whether to proceed with AI initiatives or what to fix first.

Common Mistake: Assuming "we have data" means "our data is ready for AI." The Data Foundations section often reveals that data exists but isn't clean, consistent, or accessible enough for AI to use effectively.

What to Do With Your Results

If You Scored Well Across All Tools

Congratulations — you're in better shape than most. Keep monitoring, address the few gaps you found, and you likely don't need an external audit. Consider the AI Readiness score as your guide for next investments.

If You Found Significant Gaps

This is normal. Most organisations discover issues in at least two of the four areas. You have three options:

Option 1: Fix It Yourself

Use your completed tools as a roadmap. Prioritise based on risk scores and tackle issues systematically. This works if you have internal capacity and the issues are relatively contained.

Option 2: Bring In Targeted Help

If specific areas need expertise you don't have (e.g., data architecture, process automation), engage specialists for those specific problems. Your completed tools make briefing them fast.

Option 3: Get a Full Audit

If the gaps are systemic, interconnected, or you need executive-grade documentation to drive change, consider the full Business Technology Effectiveness Audit. Your completed tools give us a 2-week head start.

Sharing Your Results

These tools are designed to be shared with leadership. The scoring makes it easy to have objective conversations about technology health without it becoming personal or political.

Frequently Asked Questions

How often should I update these?

Technology Inventory: Quarterly. Risk Scorecard: After any significant process change or incident. Reporting Health: Annually. AI Readiness: Before any major AI investment decision.

Who should complete these tools?

Ideally, someone with cross-functional visibility — often an operations lead, COO, or IT manager. For best results, validate answers with department heads rather than guessing.

What if I don't know the answer to a question?

Write "Unknown" — that's valuable data. A high number of "Unknown" responses is itself a finding: it means visibility is a problem.

Can I share these tools with others?

Yes. These tools are free to use and share. We only ask that you keep the NeoForge branding and link back to neoforge.co if you distribute them.

What if my results suggest I need help?

That's exactly what these tools are designed to reveal. If you'd like to discuss your findings, reply to this document or contact us at neoforge.co — no sales call required.

Download the Tools

All four tools are Excel files that work in Microsoft Excel, Google Sheets, or any compatible spreadsheet application.

📄 [Technology Inventory](#)

⚠️ [Process Risk Scorecard](#)

📄 [AI Readiness Checklist](#)

📄 [Reporting Health Check](#)

Questions? Contact us at neoforge.co — we're happy to help you interpret your results.

NeoForge Consulting LLC

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