

DIGITAL TRANSFORMATION STRATEGY SNAPSHOT



This short exercise helps you define what success looks like for your manufacturing operation and creates a shared reference point for deciding where to focus first.

DEFINE SUCCESS

Before technology, before tools, before solutions, the first step is clarity. This section helps you define what success looks like for your manufacturing operation.

In the next 6-12 months, which outcomes matter most for your operation?

Select up to three:

- ☐ Reduce downtime
- ☐ Improve throughput
- ☐ Address labor constraints
- ☐ Increase visibility into operations
- ☐ Improve quality or traceability
- ☐ Strengthen security and system reliability

If these outcomes improved, what would be different in your day-to-day operation?

WHERE PROGRESS FEELS FRAGILE

Digital transformation often stalls where complexity, risk, or uncertainty exist. This section helps you identify where progress feels hardest to sustain.

Which of the following most often **slow progress** or **increase risk**?

Check all that apply:

- ☐ Too many disconnected systems
- ☐ Manual or duplicate data entry
- ☐ Cybersecurity concerns
- ☐ Limited visibility into production status
- ☐ Pilots that never scaled
- ☐ Unclear ownership between IT and operations

Which one creates the most frustration or uncertainty right now?

WHERE ARE YOU TODAY

Answer based on your current reality, not intent or future plans.

Rate each area:

Visibility into Operations

(real-time production status, downtime, work-in-progress visibility)

- ☐ Needs Attention
- ☐ Somewhat Working
- ☐ Working Well

Reliability of systems people depend on

(MES, ERP, shop floor devices, integrations, uptime consistency)

- ☐ Needs Attention
- ☐ Somewhat Working
- ☐ Working Well

Alignment between IT and operations

(shared priorities, ownership, decision-making, communication)

- ☐ Needs Attention
- ☐ Somewhat Working
- ☐ Working Well

Confidence scaling new initiatives

(moving from pilot to standard practice without rework or disruption)

- ☐ Needs Attention
- ☐ Somewhat Working
- ☐ Working Well

Ability to trust and use data

(accuracy, consistency, confidence in reports, single source of truth)

- ☐ Needs Attention
- ☐ Somewhat Working
- ☐ Working Well

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YOUR STRATEGY SNAPSHOT

Capture what matters most coming out of this exercise. This snapshot becomes a reference point for alignment, planning, and next steps.

Our definition of success:

Our biggest gap or source of risk:

What feels risky to guess on without guidance:

If we could improve one thing in the next 90 days, it would be:

WHAT THIS CREATES

By completing this Strategy Snapshot, you've taken a meaningful first step toward Digital Transformation—not by choosing tools, but by creating clarity.

You now have:

- A shared definition of success
- Visibility into where progress feels fragile
- Insight into which risks deserve attention first

This clarity is what allows digital transformation to move from intention to impact.

BEFORE YOU MOVE FORWARD, CHALLENGE YOURSELF

These questions are meant to create honest reflection. If these questions are difficult to answer, that's not a failure—it's a signal. And it's often the best place to start

Clarity & Alignment

- If every leader defined "digital transformation," would the answers match?
- Are we solving root problems—or reacting to **symptoms**?

Visibility & Trust

- Do we trust our data enough to make decisions without manual double-checking?
- Where are we still relying on tribal knowledge or heroics?

Momentum & Scale

- Which initiatives feel easy to start—but hard to sustain?
- What prevents successful pilots from becoming standard practice?

Risk & Ownership

- Where would a system failure hurt the most today?
- Do IT and operations share ownership—or pass responsibility?

READY TO TURN INSIGHT INTO ACTION?

You've just identified what success looks like, where progress feels fragile, and which gaps create the most risk for your operation.

The **next step isn't buying technology it's deciding where to focus first**, what not to tackle yet, and how to reduce risk while building momentum.

An InsITe Advisor can walk through your Strategy Snapshot with you to:

- Pressure-test assumptions
- Identify early wins vs. long-term plays
- Translate clarity into a practical, phased roadmap toward smart manufacturing

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