

Zero-touch mobility readiness checklist

Find the gaps. Choose one workflow to improve.



Use this checklist to assess how employee changes move through mobility systems, from the initial event to a verified result. Focus on the work that needs clearer rules, better connections, or an accountable owner.

Zero-touch means routine actions follow approved policies, while people handle exceptions. It does not mean every task runs unattended.

Five stages to a more dependable lifecycle

- | | | |
|----|---------------------|---|
| 01 | See | Connect employees, devices, services, owners, and costs. |
| 02 | Standardize | Define eligibility, approvals, lifecycle rules, and exceptions. |
| 03 | Connect | Link the systems and identify which records to trust. |
| 04 | Automate | Start with approved, repeatable actions and verify the results. |
| 05 | Manage by exception | Assign owners, resolution timeframes, and escalation paths. |

Set the scope before you score

Choose one team, employee population, or workflow. Answer for that scope. Mark YES only when all applicable elements work consistently; use PARTIAL when coverage or execution is incomplete.

TEAM OR WORKFLOW _____

REVIEW DATE _____

YES / 2 POINTS

All applicable elements work consistently.

PARTIAL / 1 POINT

Some elements work; gaps remain.

NO / 0 POINTS

Absent or not yet demonstrated.



Where does the work break down?

Mark one response per question. Add the two question scores in each stage.

ASSESSMENT QUESTION

YES (2) PARTIAL (1) NO (0)

SEE

STAGE SCORE ____/4

- 01** Can you reliably link each employee to the correct device, service, carrier, cost center, security status, and lifecycle status?
- 02** Can you identify active and unused services, assigned and recovered devices, and unresolved inventory discrepancies?

☐	☐	☐
☐	☐	☐

STANDARDIZE

STAGE SCORE ____/4

- 03** Are eligibility, devices, service levels, and approval requirements defined for each role?
- 04** Are approved policies defined for hires, moves, departures, recovery, security requirements, legal holds, and exceptions?

☐	☐	☐
☐	☐	☐

CONNECT

STAGE SCORE ____/4

- 05** Can an authoritative employee event initiate the appropriate mobility workflow without a duplicate manual request?
- 06** Are authoritative sources defined, with a process to resolve conflicting employment, device, service, billing, and financial records?

☐	☐	☐
☐	☐	☐

AUTOMATE

STAGE SCORE ____/4

- 07** Can approved provisioning, plan changes, inventory updates, cost allocation, and invoice validation run without repeated manual entry?
- 08** Can routine hire, move, and leave steps follow approved policies, with missing data and exceptions routed to an owner?

☐	☐	☐
☐	☐	☐

MANAGE

STAGE SCORE ____/4

- 09** Does each exception have an accountable owner, a resolution timeframe, and an escalation path?
- 10** Can you verify required service, inventory, security, cost, and billing outcomes while keeping continuing exceptions tracked?

☐	☐	☐
☐	☐	☐

TOTAL SCORE ____/20

Turn the score into a next step

These score bands guide discussion. They are not a validated readiness benchmark or a certification.



17-20 Strong foundation

Validate remaining gaps before expanding automation.

10-16 Foundation in progress

Strengthen the weakest stage for your chosen workflow.

0-9 Foundation needs attention

Start with reliable records, approved rules, and clear ownership.

Check the controls before expanding

For the workflow you plan to automate, confirm that policies are approved, authoritative records are defined, an exception owner is assigned, and completion can be verified. Resolve gaps in these controls regardless of the total score.

Choose one improvement

Start with the lowest-scoring stage that blocks the workflow. Define what successful completion will look like, then assign the work.

WORKFLOW AND GAP TO ADDRESS _____

NEXT ACTION _____

ACCOUNTABLE OWNER _____ TARGET DATE _____

HOW WE WILL VERIFY COMPLETION _____

Continue the conversation

Discuss your next step with OPTRIC. Read the companion article on managing the mobility lifecycle by exception.