

Smart Office Readiness Checklist

A practical starting point for any smart workplace journey — retrofit, new build, or expansion.

This checklist helps you assess readiness across the **8 layers of the 360 Smarter Stack™**, giving you a structured platform to design your project plan. Use it to spot gaps, highlight risks, and prioritise initiatives.

1. Vision & Value

- ✓ Have you defined **clear objectives** for your smart office (productivity, cost reduction, ESG, employee engagement)?
 - ✓ Is there **executive sponsorship** with budget alignment?
 - ✓ Have success measures or **KPIs** been agreed (ROI, energy savings, utilisation rates, wellbeing metrics)?
 - ✓ Is there a **roadmap** that looks beyond initial delivery to future scalability?
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2. Operations & Culture

- ✓ Do you have a **cross-functional governance group** (IT, FM, HR, Real Estate, Leadership)?
 - ✓ Have **champions** been identified within business units to support adoption?
 - ✓ Is there a **training and change plan** ready for staff and facilities teams?
 - ✓ Are **support models and SLAs** defined for post-go-live operations?
 - ✓ Have feedback loops been planned for **continuous improvement**?
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3. User Experience

- ✓ Are **employee and visitor journeys** mapped (arrival, booking, navigation, collaboration)?
 - ✓ Have you identified **digital touchpoints** (apps, kiosks, signage, portals)?
 - ✓ Have you planned for **accessibility and inclusivity** in UX design?
 - ✓ Is there a **pilot group** for early testing and validation?
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4. Applications & Services

- ✓ Is there a workplace app/platform strategy (room/desk booking, visitor management, feedback)?
 - ✓ Are services like **wayfinding, access control, AV, and signage** integrated with back-end systems?
 - ✓ Do you have **licensing, usage, and performance monitoring** in place?
 - ✓ Are platforms selected for **scalability** and future integration?
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5. Data & Context

- ✓ Have you identified **data sources** (occupancy, energy, environmental, IoT sensors)?
 - ✓ Do you have a **data model/semantic tagging strategy** for consistency?
 - ✓ Is **data governance and security** (GDPR, ISO standards) in place?
 - ✓ Are you able to generate **insights and reports** for real-time and long-term decision-making?
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6. Integration Layer

- ✓ Have all system **APIs been mapped and documented**?
 - ✓ Is there an **integration platform** (iPaaS or middleware) in use?
 - ✓ Are **standards** (MQTT, BACnet, REST, KNX) applied to ensure interoperability?
 - ✓ Have **alerting, workflow triggers, and automation rules** been configured?
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7. Systems & Devices

- ✓ Are IoT devices and building systems **identified, calibrated, and connected**?
 - ✓ Is there an **asset register** of devices with IDs and firmware versions?
 - ✓ Are security controls in place (patching, remote access, cyber policies)?
 - ✓ Have AV, HVAC, lighting, and access control systems been **acceptance tested**?
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8. Physical Environment

- ✓ Is the **infrastructure** ready (cabling, racks, comms rooms, power, PoE)?
 - ✓ Has **resilience** been considered (UPS, backup systems, failover)?
 - ✓ Are containment, floor-boxes, and conduits aligned with **M&E planning**?
 - ✓ Is there capacity for **future growth and modular expansion**?
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Final Readiness Check

- ✓ Pilot zone or proof of concept successfully tested
 - ✓ Snagging list and remediation plan in place
 - ✓ Governance for **handover** → **BAU** defined
 - ✓ KPIs and reporting dashboards live
 - ✓ **Day-two enhancements** identified and scheduled
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How to Use This Checklist

- **New builds** → Apply from the ground up to ensure each layer is designed in from day one.
- **Retrofits** → Use as a gap analysis tool to prioritise upgrades and quick wins.
- **Ongoing optimisation** → Revisit quarterly to benchmark maturity and plan “next step” initiatives.

The **360 Smarter Stack™ framework** then helps translate this readiness into **structured project delivery** — from business case to design, build, go-live, and scale.

Smart Office Readiness Scorecard

Measure where you are today, and identify what's needed to move forward.

This scorecard helps you evaluate your smart office readiness across the **8 layers of the 360 Smarter Stack™**.

Score each statement **1–5**:

- **1 = Not started**
 - **2 = Early discussions**
 - **3 = In progress / partial delivery**
 - **4 = Largely implemented**
 - **5 = Fully complete and embedded**
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1. Vision & Value

- 1** Clear objectives (productivity, ESG, cost, wellbeing) defined
- 2** Executive sponsorship and stakeholder alignment secured
- 3** Success measures (KPIs, ROI, savings) agreed
- 4** Long-term roadmap (3–5 years) established
- 5** Value proposition understood across IT, FM, HR, leadership

Score: ____ / 25

2. Operations & Culture

- 1** Governance group and champions identified
- 2** Training and change plan developed
- 3** Post-go-live operating model defined
- 4** Feedback loops embedded into BAU
- 5** Roles and SLAs for IT/FM clarified

Score: ____ / 25

3. User Experience

- 1 User journeys mapped (employees, visitors, facilities)
- 2 Digital touchpoints (apps, kiosks, signage) identified
- 3 Accessibility and inclusivity measures applied
- 4 Unified front-end strategy defined
- 5 Pilot testing completed with feedback

Score: ____ / 25

4. Applications & Services

- 1 Workplace apps/platforms selected and integrated
- 2 Booking tools (desk/room) operational
- 3 Wayfinding, visitor, signage systems live
- 4 Integration with enterprise apps (HR, BMS, etc.)
- 5 Usage and licensing monitored

Score: ____ / 25

5. Data & Context

- 1 Data sources (occupancy, energy, IoT sensors) identified
- 2 Data model / tagging strategy developed
- 3 Governance and security in place
- 4 Real-time and historical reporting live
- 5 Insights applied to FM, energy, space planning decisions

Score: ____ / 25

6. Integration Layer

- 1 APIs mapped and documented
- 2 Middleware/iPaaS deployed
- 3 Standards (MQTT, BACnet, REST, etc.) applied
- 4 Enterprise integration (SAP, O365, HR) complete
- 5 Alerts, triggers, and automations configured

Score: ____ / 25

7. Systems & Devices

- 1 IoT sensors deployed and calibrated
- 2 AV, lighting, HVAC, access control connected
- 3 Asset register with firmware/IDs maintained
- 4 Cybersecurity controls (patching, remote access) applied
- 5 Acceptance testing completed

Score: ____ / 25

8. Physical Environment

- 1 Cabling, racks, and PoE designed for modularity
- 2 Resilience in place (UPS, failover, monitoring)
- 3 Comms rooms secured and conditioned
- 4 Floor-boxes, conduits, containment aligned with M&E
- 5 Expansion capacity designed in

Score: ____ / 25

Final Readiness Scoring

Total Score: ____ / 200

Convert your score into readiness:

- **0–80 = Early Stage** → Foundation work required.
 - **81–140 = Developing** → Some layers progressing, but gaps remain.
 - **141–180 = Advanced** → Strong progress, focus on optimisation.
 - **181–200 = Smart Leader** → Ready to scale and optimise portfolio-wide.
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How to Use This Scorecard

- Use as a **baseline diagnostic** for new projects.
- Repeat every **6–12 months** to track maturity.

- Apply scores by department (IT, FM, HR, Real Estate) for comparison.
- Link results directly into a **360 Smarter Stack roadmap**