

# **Service Transformation Readiness Checklist**

7 Steps to Becoming a Truly  
Service-Centric Business

# Ready to Lead with Service?

Use this checklist to assess where you really are on your service centricity journey. Tick what's true today and use the gaps to guide what comes next, with actionable steps and real-world examples to support you.

We hope you find it useful. If you have feedback or questions – or want to talk more about your next step toward service centricity – we'd love to [hear from you](#).

1.

Market  
UnderstandingOpportunity  
MappingYour Next  
Steps

# Are you clear on your service business opportunity?

A strong service business starts with market clarity. Knowing what your customers truly need and where your growth potential lies is essential.

- ☐ We've assessed market trends and customer pain points.
- ☐ We're focused on long-term service revenue, not just short-term fixes.
- ☐ We're using AI and analytics to anticipate future customer needs.
- ☐ We've validated customer needs through direct research (e.g. surveys, interviews).
- ☐ We've identified new service offerings or models (e.g. predictive, proactive) with the highest growth potential.

Ask customers about their challenges and desired outcomes, not just your offerings. Look outside of your industry for inspiration.

Listen to [expert insight from Tim Baines](#) of the Advanced Services Group at Aston Business School on the forces driving outcomes-based service and the framework his team has created to help guide organizations through that journey.

# 2.

Vision Clarity

Cross-Functional  
Collaboration

Your Next  
Steps



## Do you have a service vision and strategy that the entire business can get behind?

To lead with service, your strategy must go beyond vision – it must be operational, outcomes-driven, and backed by every team.

- ☐ Our team can clearly articulate what service success looks like over the next 3–5 years.
- ☐ Our strategy is tied to measurable customer outcomes (e.g. uptime, experience, cost savings).
- ☐ The service vision aligns with broader business goals like sustainability, product innovation, and customer experience.
- ☐ Key departments (e.g. sales, finance, product) are invested in shaping and delivering the service vision.
- ☐ The strategy is actively shared, reviewed, and aligned across the business.

Create a service strategy document with clear outcomes and share it with all key departments for feedback and alignment.

Discover how [Dell eliminated siloes](#) to achieve end-to-end service cohesiveness.

# 3.

Leadership  
Buy-In

Cultural  
Readiness

Your Next  
Steps



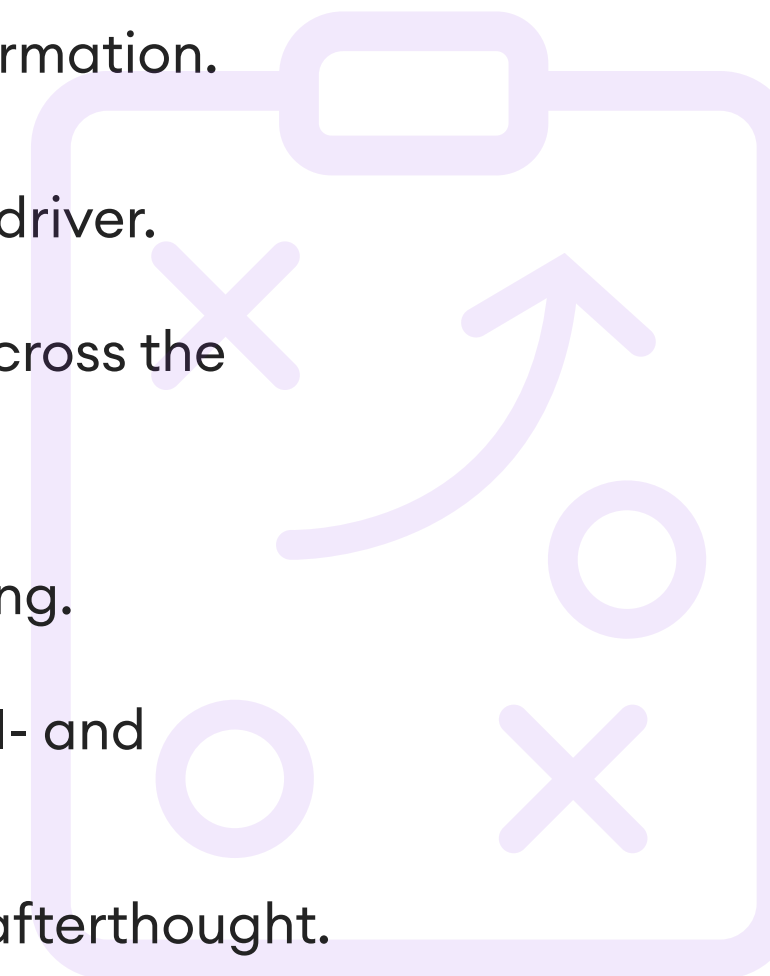
## Is your leadership team aligned and ready to drive service transformation?

Service-centricity will only work when leadership does more than support it – they shape the mindset and culture that make it possible.

- ☐ We have active executive sponsorship for service-centric transformation.
- ☐ Senior leaders understand and advocate for service as a growth driver.
- ☐ The leadership team communicates a consistent service vision across the business.
- ☐ We're actively shifting from product-first to service-centric thinking.
- ☐ Teams are prepared to embrace new service models, including AI- and automation-powered approaches.
- ☐ Change management is part of the leadership agenda – not an afterthought.

Position service as a strategic, company-wide priority. Ensure leaders are actively championing the vision – in messaging, decision-making, and the way success is measured across teams.

Hear from the [CSO of GEA](#) on bringing service into the DNA of a traditionally product-led organization.



# 4.

Tracking  
Progress

Change  
Management

Your Next  
Steps



## Do you have the right governance and accountability structures in place?

Even the strongest service strategy will stall without clear ownership, measurable goals, and the processes and tracking to turn intent into impact.

- ☐ We've established KPIs to measure the impact of our service initiatives.
- ☐ Customer satisfaction metrics are tied directly to our service strategy.
- ☐ A team is accountable for tracking and reporting on progress.
- ☐ We have a defined process for reviewing and updating our service approach in response to internal and external changes.
- ☐ We use a consistent change communication plan that keeps all stakeholders aligned during service transformation.
- ☐ We proactively address resistance to change, for example, by adapting training, reinforcing the 'why,' or activating local champions to provide support.

Establish a governance model that ties customer satisfaction to service success, and track metrics like revenue growth and churn reduction. Hold monthly reviews to stay accountable and on track.

Consider expert guidance from Alastair Winner, Partner and Co-Founder at Mossrake Group, about [what service providers need to consider](#) in successfully positioning outcomes-based services.

# 5.

Organizational  
Design

Service Delivery  
Capabilities

Your Next  
Steps



## Is your organization structured to deliver service at scale?

To scale service, you need an operating model designed for collaboration, responsiveness, and customer value at every touchpoint.

- ☐ Our existing structure supports a scalable, service-centric model.
- ☐ We've addressed silos between product, service, and customer-facing teams.
- ☐ Customer Success teams are in place to drive engagement across the lifecycle.
- ☐ We've implemented enablers like remote monitoring, AI-powered troubleshooting, or predictive maintenance.
- ☐ Our teams are equipped to deliver consistent, proactive service across channels.

Break down functional silos and design cross-functional teams around customer experience. Adopt scalable capabilities like predictive maintenance, AI, or AR to support proactive, high-value service.

Learn from [RICOH's mindset + toolset](#) approach to remote service.



Tech  
Infrastructure

Tech Scalability

Your Next  
Steps



# Is your tech foundation future-ready and aligned with your service goals?

Technology is the backbone of service centricity – but only if it's built to scale, connect your data, and support long-term growth.

- ☐ Our current tech stack supports automation, data analytics, and personalized service.
- ☐ We use a unified, cloud-based platform to centralize service data and deliver real-time insights.
- ☐ Our systems give both employees and customers access to the information they need, when they need it.
  
- ☐ Our platforms are scalable and flexible enough to support new service models and technologies (e.g. AI, IoT, AR/VR).
- ☐ We're planning for future integrations, upgrades, and innovations that align with our service goals.

Review your tech stack and move toward a platform that supports AI-driven service, real-time insights, and scalability.

Hear how ABB is [incorporating tools like AI](#) and AR to modernize field service and transform customer experience.

# 7

Continuous  
Improvement

Customer-Centric  
Innovation

Your Next  
Steps



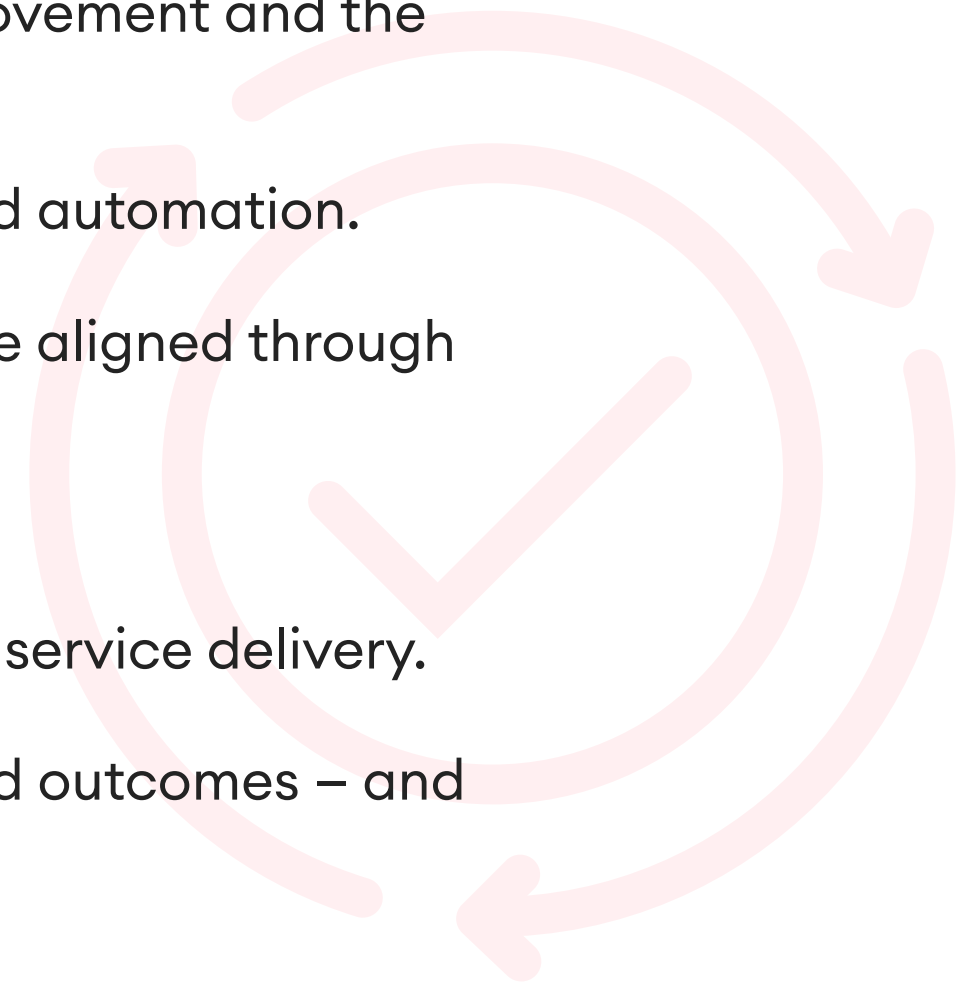
## Are you continuously managing change and improving your service offerings?

Service centrality is a continuous cycle of feedback, adaptation, and innovation, not a one time shift.

- ☐ Our change management approach supports continuous improvement and the evolution of our service model over time.
- ☐ Teams are equipped to adopt emerging technologies like AI and automation.
- ☐ We prioritize internal engagement and upskilling to keep people aligned through change.
- ☐ We collect and act on real-time customer feedback to improve service delivery.
- ☐ We track how well we're helping customers achieve their desired outcomes – and evolve our offerings accordingly.

Regularly measure customer and employee sentiment, and use that insight to identify where change is needed most – and what holds the most opportunity.

Learn more about the [neuroscience of change management](#) from Dr. Elizabeth Moran.





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