ADOPTION LEVEL INSTRUMENT · AUGUST 28, 2026

Manufacturing Practices Self-Assessment

Nineteen Yes/No questions that identify a manufacturer's current adoption level before reviewing the full Adoption Grid.

ORGANIZATION ____________ COMPLETED BY ____________ DATE ____________

HOW TO USE THIS ASSESSMENT

Answer Yes or No based on consistent, day-to-day reality — not recent best performance or stated intentions. Work through the questions in order. The last question you can answer Yes to gives your approximate level. Use the Adoption Grid to explore the detail behind each level.

Questions 1–2

LEVEL 1 / 2 BOUNDARY

1 Does your organization have a dedicated production control or operations function with its own reporting structure and authority to direct production priorities?

☐ YES ☐ NO

> A No means production priorities are still negotiated inside shipping, sales, or engineering — **Level 1**.

2 When a production problem occurs, is there a recognized process for identifying who responds and how it gets resolved — even if management involvement is sometimes needed to keep it on track?

☐ YES ☐ NO

> A No means problems are still fought as they occur with no repeatable path — **Level 1**.

Questions 3–6

LEVEL 2 / 3 BOUNDARY

3 Is there a central source — whether a system, a shared report, or a regularly updated status board — that your production team uses to check order and inventory status?

☐ YES ☐ NO

> A No means there is no consistent point of reference for production status — **Level 2**.

4 When production priorities need to change, is there a single person or role responsible for communicating that change to affected departments?

☐ YES ☐ NO

> A No means priority changes are still negotiated department by department — **Level 2**.

5 Does your organization have a working understanding of what production changes can cost the business — and the authority to use that information to resist changes imposed by sales, marketing, or executive leadership?

☐ YES ☐ NO

> A No means production either cannot quantify the cost of unplanned changes, or lacks the organizational standing to present that information as a basis for pushback — **Level 2**.

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6 Are production instructions for recurring work documented and accessible to shop floor operators — even if they are not always the primary reference used?

☐ YES ☐ NO

> A No means operators are working entirely from memory, habit, or informal direction with no documented baseline — **Level 2**.

Questions 7–11

LEVEL 3 / 4 BOUNDARY

7 Are non-production staff confident enough in production data systems to answer customer questions about delivery timing, order completeness, and production corrections independently — contacting the shop floor only when a situation falls outside normal status updates?

☐ YES ☐ NO

> A No means formal production control processes are not considered accurate or reliable enough to be used as the basis for customer communications — status is still obtained through direct contact with the shop floor — **Level 3**.

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8 Are your Bills of Material and routings current, complete, and actively maintained as production records and engineering changes occur?

☐ YES ☐ NO

> A No here is a hard gate — without reliable BOMs and routings, no planning or scheduling system will produce trustworthy results regardless of how it is configured — **Level 3**.

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9 Are there formal, documented rules for developing production instructions that are consistently followed — ensuring work is performed only to approved instructions and not to informal guidance from customers, sales, or other sources outside the standard approval process?

☐ YES ☐ NO

> A No means formal work instruction development exists in policy but not in practice — operators are working to a mix of approved instructions and informal direction that has bypassed the approval process. This is one of the most common sources of quality escapes, customer disputes, and untraceable rework, and it directly undermines the value of any planning or scheduling system because the work being performed may not match what the system expects — **Level 3**.

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10 Do shop floor employees enter production transactions — material issues, labor, completions — in the system on the same day the activity occurs?

☐ YES ☐ NO

> A No means the organization still tolerates batched or delayed data entry — real-time discipline has not taken hold — **Level 3**.

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11 Do procurement, quality, warehousing, and maintenance interact with production through defined, scheduled processes — without production having to chase them for updates or responses? ☐ YES ☐ NO

> A No means cross-functional coordination is still informal or reactive, creating unpredictable inputs to production scheduling — **Level 3**.

Questions 12–16

LEVEL 4 / 5 BOUNDARY

12 When early warning signals for a production disruption are raised, does the schedule actually adjust before the disruption becomes a crisis? ☐ YES ☐ NO

> A No means the indicators exist but do not drive action in time — the signal is not useful if the outcome is the same — **Level 4**.

13 Can your leadership team make customer delivery commitments based on system data alone, without needing to verify with the shop floor first? ☐ YES ☐ NO

> A No means the data is not yet trusted for decision making — **Level 4**.

14 When a production error or late delivery occurs, can you trace the cost to a specific department, process step, or decision point? ☐ YES ☐ NO

> A No means error cost data exists but cannot be used to drive targeted improvement — **Level 4**.

15 When something goes wrong, does your team identify and fix the root cause — and does that fix get applied consistently across all similar processes, not just the one that failed? ☐ YES ☐ NO

> A No means problem resolution is still localized or symptomatic — **Level 4**.

16 Is cross-training standard practice so that no single employee's absence can stop a production process or block access to critical information? ☐ YES ☐ NO

> A No means the organization is still dependent on specific individuals rather than the system — **Level 4**.

Questions 17–19

LEVEL 5 / 6 BOUNDARY

17 Is production performance reported at the executive level alongside financial results — and does it visibly influence strategic decisions? ☐ YES ☐ NO

> A No means manufacturing is still seen as operational rather than strategic — **Level 5**.

18 Are production capabilities — capacity, lead time, quality performance — referenced in sales conversations or used as the basis for customer commitments? ☐ YES ☐ NO

> A No means manufacturing output is reported internally but not leveraged as a competitive position externally — **Level 5**.

19 Does your manufacturing organization initiate investments in new technology based on its own roadmap, rather than waiting for direction from IT or executive leadership? ☐ YES ☐ NO

> A No means manufacturing is a technology consumer, not a driver — **Level 6** has not been reached.

Scoring Reference

Find the last question you answered Yes to. The row it falls in is your approximate adoption level. If you answered No to Question 1, your level is Discovery.

LAST YES ANSWER	CORRESPONDING LEVEL	MARK
Questions 1–2	**Level 2** — Visibility	☐
Questions 3–6	**Level 3** — Engagement	☐
Questions 7–11	**Level 4** — Conviction	☐
Questions 12–16	**Level 5** — Mastery	☐
Questions 17–19	**Level 6** — Innovation	☐
None	**Level 1** — Discovery	☐

NOTES AND OBSERVATIONS

Record the questions where the answer was contested or where practice varies by product line, shift, or facility.

Use the Adoption Grid to explore the detail behind each level.

What Your Result Means

The level you land on describes how work gets done on a consistent day. It is not a measure of how capable your people are or how hard they work. Every level on this scale is occupied by profitable, well-run manufacturers. A low result is not a verdict on the organization — it identifies which disciplines have been formalized and which are still carried by individuals.

The value is in what the result makes visible. The questions you answered No to at or below your level are your preparation work list, and they are already in dependency order — each one is a condition for the ones above it. Question 8 deserves separate attention regardless of where you land: if Bills of Material and routings are not current and actively maintained, no planning or scheduling system will produce trustworthy results no matter how it is configured. That gap gets closed before implementation begins, not during it.

The outcome this assessment is built to produce is a shared, honest starting point that both sides of the project can work from:

> **For the implementation team:** it locates where project risk actually lives before scope, budget, and timeline are set, and it separates the work that software resolves from the work the organization has to do for itself.

> **For the manufacturing users:** it makes the preparation ask concrete and finite, and it connects daily discipline — same-day transactions, approved instructions, maintained BOMs — to whether the new system will be trusted once it goes live.

Neither side has to guess what the other is walking into. The goal is not to reach Level 6 before starting. The goal is to begin implementation with an accurate picture of current practice and an agreed plan for closing the gaps that would otherwise surface as surprises, change orders, and lost confidence after go-live.