

TECHNOLOGY READINESS CHECKLIST

Before your next planning or budget conversation, review how your program manages work today and where technology could reduce gaps.

Current Systems

- ☐ Spreadsheets
- ☐ Shared inboxes
- ☐ Paper forms
- ☐ PDFs and scans
- ☐ Case notes
- ☐ Shared drives
- ☐ Manual reports

Process Review

- ☐ Intake steps documented
- ☐ Referral sources identified
- ☐ Staff handoffs mapped
- ☐ Scheduling process reviewed
- ☐ Status updates tracked
- ☐ Document storage reviewed
- ☐ Outcome tracking defined

Planning Needs

- ☐ Budget timeline confirmed
- ☐ Program goals identified
- ☐ Reporting needs documented
- ☐ Staff capacity reviewed
- ☐ Stakeholder requirements gathered
- ☐ Security requirements reviewed
- ☐ Future growth considered

EVALUATE CURRENT WORKFLOW

Intake & Referrals

- ☐ Online referrals available
- ☐ Required fields defined
- ☐ Case details captured
- ☐ Eligibility review process clear
- ☐ Referral routing documented
- ☐ Duplicate entries reduced
- ☐ Follow-up tasks assigned

Scheduling & Coordination

- ☐ Neutral availability tracked
- ☐ Party availability collected
- ☐ Session dates selected efficiently
- ☐ Reminders sent
- ☐ Reschedules managed
- ☐ Cancellations tracked
- ☐ Calendar updates shared

Communications

- ☐ Party messages
- ☐ Neutral updates shared
- ☐ Staff notes centralized
- ☐ Standard templates used
- ☐ Missing documents flagged
- ☐ Next steps clear
- ☐ Message history searchable

TRACK PROGRAM OPERATIONS

Case Tracking

- ☐ Case status
- ☐ Assigned neutral
- ☐ Upcoming sessions
- ☐ Open tasks
- ☐ Missing information
- ☐ Delayed cases
- ☐ Activity history

Documents & Forms

- ☐ Intake forms
- ☐ Notices
- ☐ Agreements
- ☐ Uploaded files
- ☐ Current versions
- ☐ Secure access
- ☐ Searchable records

Program Oversight

- ☐ Staff workload
- ☐ Case volume
- ☐ Program activity
- ☐ Bottlenecks
- ☐ Pending referrals
- ☐ Open matters
- ☐ Completed matters

REPORTING & OUTCOMES

Reporting

- ☐ Case volume
- ☐ Referral sources
- ☐ Session activity
- ☐ Outcome data
- ☐ Program trends
- ☐ Stakeholder reports

Future Readiness

- ☐ Growing demand
- ☐ Better visibility
- ☐ Less manual work
- ☐ Better reporting
- ☐ AI readiness
- ☐ Scalable workflows
- ☐ Budget support

NOTES

Gaps, questions, budget notes, and next steps:

NEXT STEP

Ready for a clearer way to manage your ADR program?

ADR Notable helps courts and ADR programs manage the work behind resolution in one secure platform. **Schedule a discovery call at adrnotable.com/discovery-call**