

CYTRIC PERFORMANCE & OPTIMIZATION CHECKLIST



Comprehensive Diagnostic & Maturity Assessment Tool

Introduction

A properly configured Cytric environment should drive policy compliance, spend visibility, user satisfaction and operational efficiency. However, many organizations operate below optimal maturity due to legacy configurations, limited integrations, or low user adoption.

This diagnostic framework allows you to assess your current state, identify improvement areas, and determine whether your environment is optimized for measurable business value.

How to Use This Checklist

Rate each statement using the following scale:

- 1 = Not implemented
- 2 = Limited implementation
- 3 = Partially optimized
- 4 = Well optimized
- 5 = Fully optimized / Best practice

After completing all sections, calculate your total score and review the interpretation guide in Section 8.

Checklist

Configuration & Governance

- Cytric configuration is fully aligned with your travel and expense policy.
- Approval workflows are standardized across departments and geographies.
- Global vs. local rules are clearly defined and documented.
- Configuration documentation is maintained and version-controlled.
- Policy compliance rules are embedded and enforced automatically.
- Role and access structures are clearly defined and audited.

Adoption & User Experience

- Online adoption rate is measured and reported monthly.
- User onboarding is structured and standardized.
- Booking flows are optimized for speed and simplicity.
- User feedback is collected and translated into improvements.
- Policy breaches are analyzed and corrective actions implemented.
- Mobile and remote usability is optimized.

Integration & Technical Architecture

- Cytric is fully integrated with ERP/finance systems.
- HR master data is synchronized automatically.
- API integrations are monitored and documented.
- Data reconciliation is automated.
- Integration failures are proactively monitored.
- System architecture supports scalability and future expansion.

Reporting & Performance Management

- Adoption KPIs are reviewed at executive level.
- Dashboards are tailored for different stakeholder groups.
- Spend analytics support strategic decision-making.
- Data accuracy is regularly audited and validated.
- Performance metrics drive continuous improvement initiatives.
- Reporting processes are automated and consistent across regions.

Operational Scalability & Support Model

- The system supports multi-country rollout.
- Governance supports organizational growth and restructuring.
- Internal or external Cytric expertise is available when needed.
- Support model is proactive rather than reactive.

[] Change management processes are clearly defined.

[] A continuous improvement roadmap exists.

Scoring and Interpretation

Total number of questions: 30

Maximum possible score: 150

Add your scores from all sections and calculate your percentage.

Interpretation:

80–100% (120–150 points)

High maturity environment.

Your Cytric setup is structured, optimized and scalable. Focus on continuous improvement and innovation.

60–79% (90–119 points)

Moderate maturity.

Your environment is functional but contains optimization opportunities in governance, integration or adoption.

Below 60% (Under 90 points)

Structural gaps identified.

Your Cytric environment likely requires strategic review, configuration restructuring or integration improvement.

Executive Summary

Your Cytric Maturity Score

Total Score: _____ / 150

Maturity Level: _____

What This Means for Your Organization

Based on your assessment:

High maturity environment: Your environment is well-structured but may benefit from targeted optimization

Moderate maturity: You have clear improvement opportunities in specific functional areas

Structural gaps identified: Your Cytric setup likely requires structural review and strategic intervention

Key Strengths Identified:

- _____
- _____
- _____

Primary Optimization Areas:

- _____
- _____
- _____

Recommended Priority Actions:

- _____
- _____
- _____

Next Steps – Cytric Performance Review

If you would like to validate your assessment results and identify quick wins, you can request a complimentary 30-minute Cytric Performance Review with a certified specialist.

During the session we will:

- Review your maturity score
- Identify 2–3 immediate improvement opportunities
- Outline a structured optimization roadmap

Request your review session at:

travel@cyclad.eu

Contact Cyclad to schedule your Cytric Performance Review and receive expert guidance tailored to your organization.

Unlock Measurable Value from Your Cytric Environment

