Digital Transformation Readiness Assessment & Action Toolkit

Discover where your business stands and create your roadmap to digital excellence

SUCCESS LEAPS CONSULTING
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Assessment

Digital transformation **is a journey**, not a destination. Start with small wins, build momentum, and continuously evolve your digital capabilities.

Part 1: Digital Maturity Assessment

Instructions: Rate each statement from

 1-5 where:

- 1 = Not at all / Never
- 2 = Rarely / Minimal
- 3 = Sometimes / Moderate
- 4 = Often / Good
- 5 = Always / Excellent

Technology Infrastructure (Score: ___/25)

☐ Our technology systems are modern, integrated, and cloud-based

☐ We have reliable cybersecurity measures and data backup systems

☐ Our team can access work tools and data from anywhere

☐ We regularly update and maintain our technology stack

☐ Our systems can scale easily as our business grows

Digital Customer Experience (Score: ___/25)

☐ Customers can easily find and engage with us online

☐ We have a user-friendly, mobile-optimized website

☐ We actively use social media and digital marketing

☐ We collect and analyze customer data to improve service

☐ Our customer service includes digital channels (chat, email, etc.)

Use this assessment every quarter to track your progress and identify new opportunities for growth

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Data & Analytics (Score: ___/25)
- ☐ We track key performance metrics digitally
- ☐ We use data to make business decisions
- ☐ We understand our customer behavior through analytics
- ☐ We have systems for collecting and organizing business data
- ☐ We regularly review reports to identify trends and opportunities

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It's time to lead your business into the world of innovation. Enhance the value of your customer experience.

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Digital Skills & Culture (Score: ___/25)
- ☐ Our team is comfortable using digital tools
- ☐ We invest in digital training for employees
- ☐ Leadership actively supports digital initiatives
- ☐ We're open to trying new technologies and processes
- ☐ We have someone dedicated to managing our digital transformation

rocess Automation (Score: ___/25)
- ☐ We've automated repetitive manual tasks
- ☐ Our workflows are streamlined and efficient
- ☐ We use digital tools for project management
- ☐ Financial processes (invoicing, payments) are largely digital
- ☐ We have digital systems for inventory/resource management

Enhance Operational Efficiency and Revenue
You are at the forefront of digital transformation.

PART 2: YOUR DIGITAL TRANSFORMATION SCORE

Total Score: ___/125

Score Interpretation:

DIGITAL LEADER (100-125 points)
You're ahead of the curve! Focus on optimization, advanced analytics, and emerging technologies like AI.

DIGITAL ADOPTER (75-99 points)
You're on the right track. Prioritize integration between systems and advanced automation opportunities.

DIGITAL EXPLORER (50-74 points)
You've started the journey. Focus on foundational improvements and building digital capabilities.

DIGITAL STARTER (25-49 points)
Time to accelerate! Start with basic digital infrastructure and customer-facing improvements.

DIGITAL NEWCOMER (Below 25 points)
Great opportunity ahead! Begin with essential digital tools and build from there.

TAKE ACTION NOW!

Ready to accelerate your digital transformation?

PART 3: YOUR 90-DAY ACTION PLAN

Immediate Actions (Week 1-2)

For Everyone:

- [ ] Conduct team assessment of current digital tools and pain points

- [ ] Research 3 competitors' digital presence

- [ ] Set up Google Analytics (if not already done)

- [ ] Create or update business profiles on Google My Business and LinkedIn

Quick Wins (Week 3-8)

Choose 2-3 based on your lowest scoring areas:

Technology Infrastructure:

- [ ] Move to cloud-based email and file storage

- [ ] Implement password manager for team

- [ ] Set up automated backups

Customer Experience:

- [ ] Optimize website for mobile devices

- [ ] Add live chat or contact forms

- [ ] Create social media posting schedule

Data & Analytics:

- [ ] Set up conversion tracking

- [ ] Create monthly KPI dashboard

- [ ] Implement customer feedback system

Skills & Culture:

- [ ] Schedule digital skills training

- [ ] Assign digital transformation champion

- [ ] Create internal communication about digital goals

Process Automation:

- [ ] Automate one repetitive task

- [ ] Implement digital invoicing

- [ ] Use project management software

Foundation Building (Week 9-12)

- [ ] Develop comprehensive digital strategy

- [ ] Create content calendar for digital marketing

- [ ] Establish data collection and analysis routines

- [ ] Plan next phase of improvements

PART 4: DIGITAL TRANSFORMATION RESOURCE KIT

Essential Tools by Category

Communication & Collaboration
- Slack or Microsoft Teams (team communication)
- Zoom (video conferencing)
- Google Workspace or Office 365 (productivity suite)

Customer Relationship Management
- HubSpot (free CRM)
- Mailchimp (email marketing)
- Calendly (appointment scheduling)

Analytics & Data
- Google Analytics (website analytics)
- Google Data Studio (reporting dashboard)
- Hotjar (user behavior insights)

Process Automation
- Zapier (workflow automation)
- QuickBooks Online (accounting)
- Trello or Asana (project management)

Digital Marketing
- Buffer or Hootsuite (social media management)
- Canva (graphic design)
- SEMrush or Ubersuggest (SEO tools)

Budget Planning Guide

Starter Budget ($100-500/month)
- Basic cloud storage and email
- Website hosting and domain
- One automation tool
- Basic analytics setup

Growth Budget ($500-2000/month)
- CRM system
- Marketing automation
- Advanced analytics tools
- Team training and certification

Scale Budget ($2000+/month)
- Enterprise software solutions
- Custom integrations
- Advanced security measures
- Dedicated digital staff or consultants

Part 5: Next Steps & Getting Help

01 Red Flags That Require Immediate Attention:

- Frequent system crashes or downtime
- No backup system for critical data
- Inability to work remotely when needed
- Customers complaining about digital experience
- Manual processes taking excessive time

RED FLAG

02 When to Consider Professional Help:

- Score below 50 and need rapid improvement
- Complex integration requirements
- Cybersecurity concerns
- Large-scale process transformation needed
- Lack of internal digital expertise

03 Success Metrics to Track

- Efficiency: Time saved through automation
- Revenue: Online sales and lead generation
- Customer Satisfaction: Digital experience ratings
- Team Productivity: Digital tool adoption rates
- Competitive Position: Digital capabilities vs. competitors

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