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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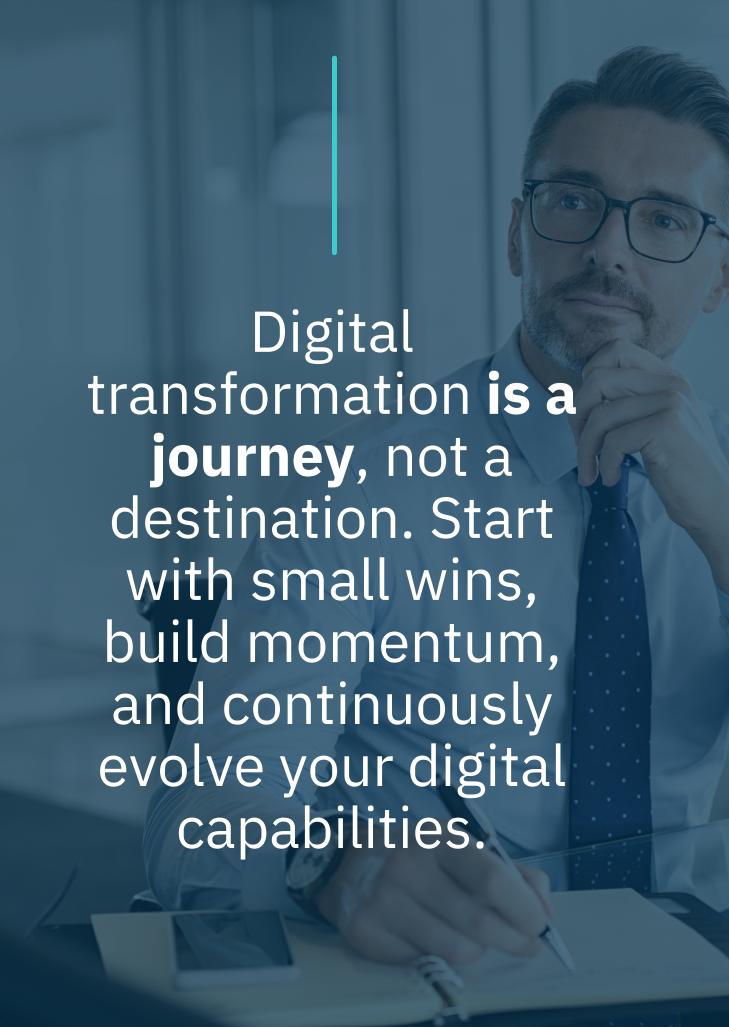












Part 1: Digital Maturity Assessment

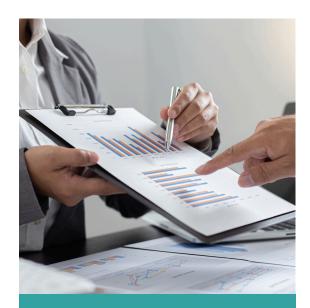
Instructions: Rate each statement

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
\square We have reliable cybersecurity measures and
data backup systems
$\hfill\square$ Our team can access work tools and data from
anywhere
\square We regularly update and maintain our
technology stack
\square 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
\square We collect and analyze customer data to
improve service
\square Our customer service includes digital channels
(chat, email, etc.)



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

Part 1: Digital Maturity Assessment

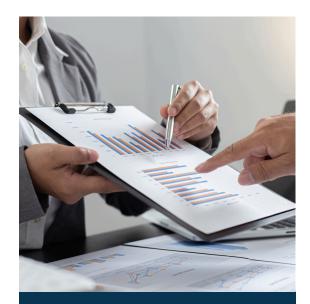
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- 5 = Always / Excellent

Data & Analytics (Score:/25) ☐ We track key performance metrics digitally ☐ We use data to make business decisions ☐ We understand our customer behavior througanalytics ☐ We have systems for collecting and organizing business data ☐ We regularly review reports to identify trends and opportunities	g
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 mprove service Our customer service includes digital channel	



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

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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
\square We have systems for collecting and organizing
business data
\square We regularly review reports to identify trends
and opportunities
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
\square We have someone dedicated to managing our
digital transformation
vecces Automotion (Coover (25)
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
\square We have digital systems for inventory/resource



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.



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



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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