

DIGITIZATION CHECKLIST

Use this checklist to evaluate your business's digitization readiness and prioritize key next steps that are right for you.

ESTABLISH DIGITAL PRESENCE	<input type="checkbox"/>	Create or update your professional, user-friendly website.	NOTES Begin by evaluating your current website for design, functionality, and mobile responsiveness to ensure it meets modern user expectations. Next, create or update business profiles on relevant social media platforms and directories to increase visibility and engagement with your target audience.
	<input type="checkbox"/>	Implement SEO best practices for better search visibility.	
	<input type="checkbox"/>	Add lead capture forms, live chat, and customer contact options.	
	<input type="checkbox"/>	Create business profiles on relevant social media platforms.	
AUTOMATE REPETITIVE TASKS	<input type="checkbox"/>	Set up email marketing automation for newsletters, promotions, and follow-ups.	NOTES Identify tasks like appointment scheduling, or customer follow-ups, that consume time but require minimal oversight. Use tools like Zapier, Calendly, or HubSpot to set up automated workflows, reducing errors and freeing up time for strategic initiatives.
	<input type="checkbox"/>	Automate appointment scheduling with online booking tools.	
	<input type="checkbox"/>	Use workflows to streamline tasks like data entry, customer follow-ups, and invoicing.	
	<input type="checkbox"/>	Integrate customer service chatbots to handle basic queries 24/7.	
UPGRADE BUSINESS PROCESSES	<input type="checkbox"/>	Digitize paper documents and set up e-signature solutions for contracts.	NOTES Transition from paper-based systems to digital platforms by digitizing key documents and contracts with tools like DocuSign or Adobe Acrobat. Implement project management software like Trello or Monday.com to streamline collaboration, task assignments, and deadline tracking across your team.
	<input type="checkbox"/>	Implement cloud-based tools for securely storing and sharing business-critical documents.	
	<input type="checkbox"/>	Use workflow automation software to reduce bottlenecks and streamline approvals.	
	<input type="checkbox"/>	Standardize and document key processes to ensure consistency and efficiency across your business.	

<h2>IMPLEMENT DATA DRIVEN DECISION MAKING</h2>	<input type="checkbox"/>	Add analytics tools (e.g., Google Analytics) to monitor website traffic and customer behavior.	NOTES
	<input type="checkbox"/>	Use CRM (Customer Relationship Management) software to track and nurture leads.	<p>Start by integrating analytics tools like Google Analytics to collect data on customer behavior, sales, and website performance. Use this data to create visual dashboards and identify trends that can guide your decision-making and strategic planning via CRM.</p>
	<input type="checkbox"/>	Implement dashboards to visualize key performance indicators (KPIs) in real time.	
	<input type="checkbox"/>	Analyze customer data to personalize marketing efforts and improve services.	
<h2>MONITOR AND OPTIMIZE</h2>	<input type="checkbox"/>	Regularly audit your website and tools for performance and functionality.	NOTES
	<input type="checkbox"/>	Test and refine workflows for automation and efficiency.	<p>Establish a regular schedule to audit your website's performance, including load times, SEO rankings, and conversion rates. Use tools like Clarity or Google Search Console to collect insights and experiment with updates to improve user experience and functionality.</p>
	<input type="checkbox"/>	Collect and act on customer feedback to enhance your services.	
	<input type="checkbox"/>	Schedule regular training sessions to upskill your team on new digital tools.	
<h2>STRENGTHEN CUSTOMER RELATIONSHIPS</h2>	<input type="checkbox"/>	Launch or optimize your email marketing strategy.	NOTES
	<input type="checkbox"/>	Provide seamless online payment options.	<p>Implement a CRM system like HubSpot or Zoho to centralize customer data and track interactions across channels. Use the insights from your CRM to send personalized emails, offer tailored promotions, and strengthen long-term customer loyalty.</p>
	<input type="checkbox"/>	Develop loyalty programs or personalized offers.	
	<input type="checkbox"/>	Offer self-service portals for customer account management.	
<h2>PARTNER WITH EXPERTS</h2>	<input type="checkbox"/>	Work with a professional web development and automation agency for tailored solutions.	NOTES
	<input type="checkbox"/>	Get expert advice on CRM, data visualization, and marketing tools.	<p>Consult with a professional agency that specializes in web development and business process automation to assess your unique needs. Leverage their expertise to implement custom solutions that align with your business goals and ensure long-term success.</p>
	<input type="checkbox"/>	Stay updated on industry trends to remain competitive.	
	<input type="checkbox"/>	Contact MWD Digital Solutions to learn more about how to implement these items in your business.	

HOW MANY CHECKS DO YOU HAVE?

Feel free to contact us if you'd like more insights or help completing any of these checklist items!

