# 6 Steps for Creating and Leveraging a Digital Assessment

*Here's how to ready your organization for digital leadership*

HERE IS the digital dilemma captured in two sets of statistics: Eighty-nine percent of executives believe digitization will disrupt their business in 2019, yet less than 33 percent of executives believe their digital strategy is correct; meanwhile, spending on digital transformation initiatives will exceed $2 trillion in 2019, yet fewer than 85 percent of digital transformation initiatives fail to deliver expected results.



How to overcome the digital dilemma? Best-in-class companies implement digital assessments to ready their organizations for long-term digital leadership. The assessment is an intuitive look into the key elements of people, process, and technology that impact an organization's ability to drive digital excellence. A digital assessment typically combines an organization's internal knowledge with external, objective opinion regarding best practices and digital leadership in related markets. It cannot be strictly an internal view, as that is generally far too limited.

A typical digital assessment consists of six steps. Steps can be modified on an individual basis to reflect the uniqueness of your organization.

### STEP 1: Initial Scoping Session, Background Materials Review, and Coordination

This initial session raises these types of scoping questions:
- How broad and deep should the digital assessment be, and where should you focus your efforts?
- What is the timeline/project schedule for the digital assessment?
- Which personnel will participate in the digital assessment?

Be sure to keep the digital assessment's scope tight. For example, one ISM customer decided its digital assessment would focus solely on its commercial website and related commercial digital assets and purposely exclude its residential and company websites and related digital assets.

### STEP 2: Review Business Direction with Executive Team and Experts

- Hold one-on-one interviews with the organization's executive team to determine business direction and how they envision digital sales, marketing, and customer service fitting into these plans.
- Consult with internal subject matter experts and/or external consultants to assess how digital sales, marketing, and customer service tools and techniques can help achieve your organization's business direction.

### STEP 3: Perform a People/Organizational Readiness Assessment

- Review your organization's digital governance structure, training, communications, reward/incentives, and other cultural issues to understand your company's ability to lead and support digital efforts.
- Evaluate usage of your organization's digital assets, including your website, social media efforts, and more.
- Chat with internal users of your organization's digital tools to determine whether current users feel the "what's in it for me" is obvious and meaningful.
- Chat with your external distribution channel members, influencers, and end customers to determine how they would like to digitally interact with your organization.

### STEP 4: Review Core Processes in Support of Digital Sales, Marketing, and Customer Service Efforts

- Review core sales, marketing and customer service processes, both digital and non-digital. How can core processes in support of digital sales, marketing, and customer service efforts be improved?
- Compare your organization's current efforts against best-in-class digital business processes.
- Determine what digital business process improvements may be in order and what changes need to be made to existing/planned digital tools and techniques.

### STEP 5: Perform a Technical Assessment

The focus for the technical assessment is to document the capabilities of your organization's current digital technologies and how these capabilities compare with best-in-class organizations.
- Review your current/planned digital platform.
- Review your data organization, utilization, and security, as well as your data integration needs.