DIGITAL MARKETING

SELF-ASSESSMENT

Transform the way you engage consumers
INTRODUCTION

Marketers are increasingly looking to know their customers, personalize each interaction based on their behavior, and engage with them on their channel of choice. While this is a common focus, sometimes knowing where to start can be a challenge. That’s why we’re offering our insights from years of experience helping companies of all sizes kick-start their digital marketing transformation.

With this assessment, you’ll be able to evaluate your company across four key dimensions: strategy, customers, technology, and operations. These dimensions, combined with two questions about your company’s digital maturity, will provide you with a launchpad for making data-driven changes.

Let’s get started.

By evaluating the four dimensions of consumer engagement, you will be able to:

01 | Identify gaps.
Uncover areas of your business that have room for improvement.

02 | Share results.
Record your scores, and use them as a way to bring teams together around common goals.

03 | Create a framework.
Use this assessment as a third-party framework to begin a conversation with key decision makers.

04 | Improve experiences.
Make changes to deliver personalized, consistent messages on every channel at every stage of the customer lifecycle.
BUSINESS READINESS

In each of the following 20 questions, please check one answer on a scale from 1 (“Strongly disagree”) to 5 (“Strongly agree”) that best represents your organization's current readiness to engage consumers. Be sure to average your score on each page.
STRATEGY

This dimension represents how your organization aligns customer-centric strategies with execution and measurement of success.

VALUE PROPOSITION
Our value proposition clearly and accurately describes our benefits, the problem(s) we solve, and how we distinguish ourselves from alternatives for our defined customer personas.

Strongly disagree 1 2 3 4 5 Strongly agree

DIGITAL TRANSFORMATION
Our organization has a defined strategic and technical roadmap for successful digital transformation with set objectives from top-line management, supported at all levels of the business.

Strongly disagree 1 2 3 4 5 Strongly agree

CUSTOMER EXPERIENCE
We consistently engage our consumers across internal departments (distributor/sales, service, marketing) and touchpoints in a unified manner, and our executives track success through consumer-centric metrics, such as CSAT or NPS.

Strongly disagree 1 2 3 4 5 Strongly agree

COMMITMENT
Our organization has and will continue to put aside appropriate funding, time, and resources to support the internal business transformation activities that are critical for ongoing success.

Strongly disagree 1 2 3 4 5 Strongly agree

MEASUREMENT
We have defined a shared plan for measurement and aligning departmental, channel, and individual goals with the broader organizational objectives.

Strongly disagree 1 2 3 4 5 Strongly agree
This dimension represents the five primary requirements to actively engage your customers across all points of interaction.

**AUDIENCE PLANNING**
We have robust customer target audiences and customer profiles defined, leveraging a comprehensive set of data sources (for example, purchase, behavioral, profile, contextual, and so on).

| Strongly disagree | 1 | 2 | 3 | 4 | 5 | Strongly agree |

**PERSONALIZATION**
All messaging is dynamically tailored to the individual based on lifecycle stage, interests, and engagement data across every possible touchpoint.

| Strongly disagree | 1 | 2 | 3 | 4 | 5 | Strongly agree |

**OMNI-CHANNEL ACTIVATION**
We orchestrate 1-to-1 customer journeys through a customer’s lifecycle across digital channels, including service centers, sales teams, social engagement, marketing, employees, and partners.

| Strongly disagree | 1 | 2 | 3 | 4 | 5 | Strongly agree |

**INSIGHTS**
We take a holistic approach to analyzing and predicting all interactions across multiple channels, have achieved a 360-degree view of the customer, and use data science and analytics to inform the evolution of the customer journey.

| Strongly disagree | 1 | 2 | 3 | 4 | 5 | Strongly agree |

**CONTACT OPTIMIZATION**
We have clear guidelines for optimal single- and cross-channel frequency and sequencing of communications, and we maximize relevance of content through continual optimization of the customer contact strategy.

| Strongly disagree | 1 | 2 | 3 | 4 | 5 | Strongly agree |
TECHNOLOGY

This dimension represents how technology helps your company meet business objectives and seamlessly engage with your consumers.

AGILITY
IT is successful at enabling the business to quickly and smoothly adapt to dynamic, complex business needs.

Strongly disagree  1  2  3  4  5  Strongly agree

ADOPTION
Our organization is willing to adopt new, best-in-class, flexible solutions for diverse sets of needs across the company that have proven and trusted security measures.

Strongly disagree  1  2  3  4  5  Strongly agree

DATA
Our organization has successfully defined, executed, and leveraged a complete single view of the customer across the business.

Strongly disagree  1  2  3  4  5  Strongly agree

BUSINESS INTELLIGENCE
Consumer data and business performance insights are easily leveraged to inform engagement strategies, formulate business goals, and even predict consumer needs.

Strongly disagree  1  2  3  4  5  Strongly agree

AUTOMATION
We leverage technologies to automate repeatable and complex tasks, allowing for increased operational flexibility to drive customer and business benefits.

Strongly disagree  1  2  3  4  5  Strongly agree

ADD UP YOUR TOTAL SCORE FOR THIS PAGE, AND DIVIDE IT BY 5. WRITE THE NUMBER BELOW.
This dimension represents five essential requirements to operationalize and scale differentiated elements of engagement across the customer journey.

**ORGANIZATIONAL DESIGN**
Our organization has the right structure to facilitate existing and new customer-centric initiatives across the organization (for example, center of excellence, innovation labs, strong leadership alignment, and so on).

Strongly disagree 1 2 3 4 5  Strongly agree

**COMPETENCY**
Our internal workforce and network, including agencies and partners, have the right expertise and proficiency to capably execute a future state approach to consumer engagement across all digital channels.

Strongly disagree 1 2 3 4 5  Strongly agree

**ACCOUNTABILITY**
Our organization demonstrates a high degree of accountability and individual ownership as shown through transparent guidelines, proper incentives, and rewarding employee success.

Strongly disagree 1 2 3 4 5  Strongly agree

**COLLABORATION**
Our organization is structured in a way that facilitates team and cross-functional collaboration, which enables effective communication and decision-making.

Strongly disagree 1 2 3 4 5  Strongly agree

**PROCESS**
We have clearly documented both scalable and repeatable business processes for activating consumer data into manual and automated points of communication.

Strongly disagree 1 2 3 4 5  Strongly agree

Add up your total score for this page, and divide it by 5. Write the number below.
DIGITAL MATURITY

In these two final questions, please select one answer that best represents your organization’s current state for both channel and engagement maturity. These questions will help you start a conversation within your organization about your overall digital maturity.
**CHANNEL MATURITY**
How would you best classify the way your organization coordinates digital messaging across channels (touchpoints) and the customer lifecycle today?

- We are engaging with our customers in a siloed, uncoordinated fashion.
- Only one of our key digital channels is coordinated across the customer lifecycle.
- More than one but not all digital channels are coordinated across the same customer lifecycle – but not necessarily as a synchronized journey.
- All of our digital channels are coordinated across the customer lifecycle stages and across channels.
- The customer experience is fully connected across distributor/commerce sales, service/support, and marketing initiatives.

**ENGAGEMENT MATURITY**
How would you best classify your organization’s ability to scale personalized customer engagement?

- Our current capabilities only enable our organization to reach customers by their basic contact information.
- We have the ability to segment customers based on a variety of attributes, such as behavior and/or purchase history, but only in an ad hoc manner.
- We have pre-segmented our customers based upon customer lifecycle stage and constantly engage with them according to those stages with planned and triggered communications, yet we lack integration with many of our IT and data systems.
- A variety of our consumer touchpoints are tailored for each individual to create extremely personalized engagement regardless of what channel or form of integration they have with the organization.
- All customer touchpoints are fully personalized and capable of real-time engagement regardless of where customers are in their unique journey with our brand.
SCORING YOUR ANSWERS

You’re one step closer to helping your company become more customer-centric. There’s just one final step: scoring. To calculate your scores, follow the instructions on the next page.
SCORING YOUR DIGITAL MARKETING SELF-ASSESSMENT

1. Turn back to the National Parks signs where you averaged your scores on pages 4–7.
2. Plot each of those scores on the graph below to see where you can improve to help your company be more customer-centric.

3. You can now see which dimensions require the most attention. For a dimension with a low score, go back and look at the categories within that dimension. Was there one that brought down the entire average, or were all scores the same? Similarly, analyze your top-performing dimensions to see what areas still need attention or improvement. This information can guide your future efforts to help you plan and evolve your consumer engagement strategy.

EVALUATING YOUR DIGITAL MATURITY

1. Review your responses to the questions on page 9.
2. Share these answers with your team to see if they agree or if they have different opinions. Your answers can be used to start a conversation about gaps in your current state of digital maturity.

CONGRATULATIONS!
You’re on your way to knowing your customers, personalizing each interaction based on their behavior, and engaging with them on their channel of preference. Now that you have a greater understanding of your company’s strengths and weaknesses in the four dimensions of consumer engagement, one of our representatives will reach out to you for a free consultation.
Visit salesforce.com/marketingcloud to learn more.