AdRoll

The Ultimate Guide to Building a Digital Brand

A Workbook For Challenger Brands That #DareToGrow

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THERE'S AN ASTEROID HEADING RIGHT AT US...

The transition to digital everything caught many companies completely by surprise even though it has been years in the making. It's easy to imagine this is how the dinosaurs felt, looking up and seeing a bright speck slowly getting closer, until it took up the whole sky. According to a 2016 survey by IDC, 85% of marketing executives felt they had a two-year window to move to a digital-first model or risk losing ground to competitors. That two-year mark passed, and we've started to see some of that prediction come to pass as legacy retailers scramble to adapt.

Luckily, there's still time to get ahead. Many of the largest brands still struggle to change their momentum and come around, and challenger brands still have room to radically transform the landscape. Brands like Casper, BirchBox, StitchFix, and others have laid the groundwork, but haven't completely taken over... yet.

WHAT IS A DIGITAL TRANSFORMATION?

Everyone has their own idea of what "digital transformation" means. For some brands, it's little more than uploading their catalog to the internet. Others have found new customers by moving advertising and marketing efforts online.

Thinking about digital purely in terms of "how can I do what I'm doing now, but online" isn't enough, and it's certainly not just creating an e-commerce website or posting occasionally on Instagram. Digital-first is about achieving the perfect unified experience for customers and, with it, brands are able to reach further to acquire customers they otherwise wouldn't have. It gives consumers, products, and systems around the world the ability to connect instantly. This gives customers new experiences and new ways to engage that add value far beyond e-commerce and acquisition.

This is what real digital transformation is all about: giving you the tools and insights to create customer experiences that are unlike anything that has come before, both online and off.

WHY DIGITAL TRANSFORMATION?

Becoming digital-first has a huge effect on every aspect of your brand. It's not just about marketing, it's about customer experience and support, logistics and fulfillment, on- and offline retail, and even community and internal culture. Moreso, becoming digital-first enables challenger brands to compete with big, well-established companies — the American dream for brands. A well-executed digital transformation will touch every department and requires buy-in at every level.

This guide will help you plan for that transformation, develop a strategy, get buy-in, and move forward confidently. This is more than just reading material — we hope you go through and scribble in the margins and use the pages like a workbook to flesh out your move to digital-first. And we hope you share it with your team and other department heads so they can add their own thoughts.

BRAND

Establishing a strong digital presence gives you a chance to separate your brand from traditional competitors.

CUSTOMER EXPERIENCE

Consumers now do almost all of their research and shopping online. Going digital meets them where they already are.

OPERATIONS

Going digital-first gives you much more granular control over your operations, keeping efficiency high and costs low.

ROI

In terms of raw cost, nothing beats digital when it comes to customer acquisition and growth.

REIMAGINING YOUR COMPANY FOR A DIGITAL TRANSFORMATION

MARKETING

Understanding your digital direction starts with understanding the market you're in. Who are you competing against? What do their digital efforts look like? What makes you different and able to offer a better value proposition to customers?

As you work through this section, think about how the market you're in has changed over the last 10 years, and try to imagine how it will change over the next 10.
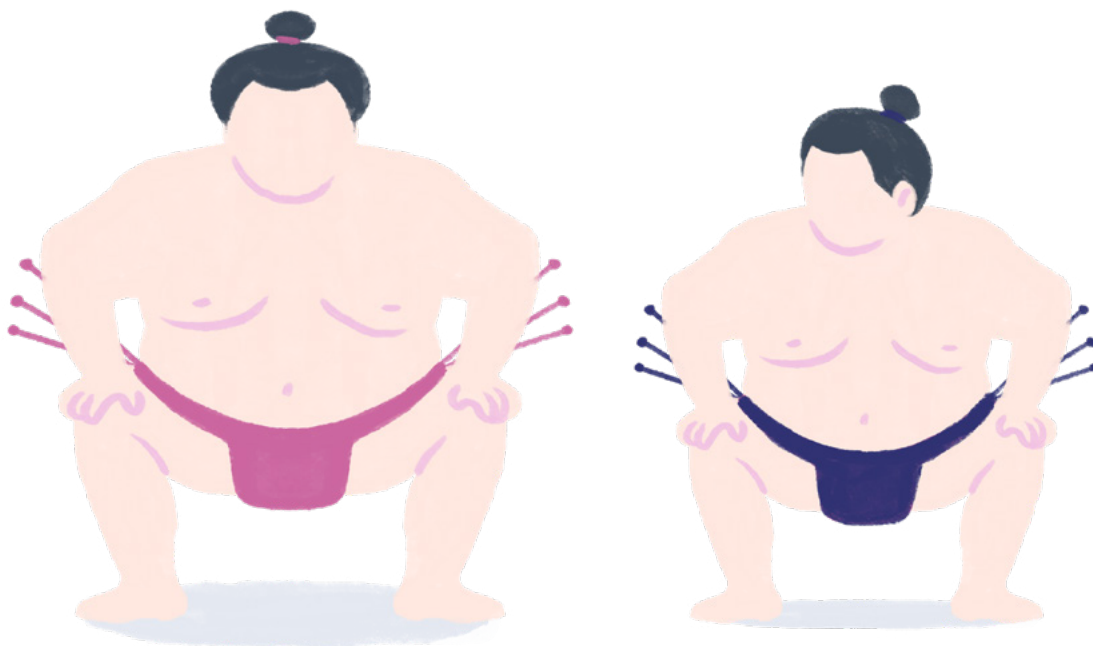
WHAT IS YOUR VALUE PROPOSITION & WHAT ARE YOUR DIFFERENTIATORS?

What do you offer that your competitors don't? Your digital transformation begins with understanding your value prop, and that begins with understanding your differentiators. List out your differentiators, and then put them all together into a simple, clear value proposition using our template. This will give you a focus to work through the rest of this guide.

OUR DIFFERENTIATORS ARE:

A. _____
_____
and this is important because
_____
_____

B. _____
_____
and this is important because
_____
_____

C. _____
_____
and this is important because
_____
_____

E.G.

TastyTee Co. makes **fun, lightweight shirts** for **foodies and food lovers**. Our **creative designs, focus on foodie culture,** and **high-quality products** distinguish us from the competition.

AND OUR VALUE PROPOSITION IS:

_____
_____ (does/makes/provides/offers)
_____ for
_____ .
Our _____ ,
_____ ,
and _____
_____ distinguish us from the competition.

PERFORM A SWOT ANALYSIS ON YOUR 3 MAIN COMPETITORS

A SWOT analysis on your top competitors can help you better understand your own strengths and the opportunities available in the market. To perform the SWOT, list out each competitor's strengths, weaknesses, opportunities that they present for you, and threats that they pose to your business.

When selecting competitors, it's a good idea to pick one that is a market leader and two that are relatively close to your size now or your target size in the next two years. Picking three companies much larger than you will give you limited insight into short- and mid-term growth and limited opportunities to push ahead. Picking three companies that are too small will limit your ability to learn from success and won't push you to achieve as much as you can.

EXAMPLE: Umami T-shirts

STRENGTHS	OPPORTUNITIES
Low cost	We can distinguish our quality
WEAKNESSES	**THREATS**
Cheap materials	They can take over market on price

COMPETITOR:

STRENGTHS	OPPORTUNITIES
WEAKNESSES	**THREATS**

COMPETITOR:

STRENGTHS	OPPORTUNITIES
WEAKNESSES	**THREATS**

COMPETITOR:

STRENGTHS	OPPORTUNITIES
WEAKNESSES	**THREATS**

CUSTOMERS

**Who do you sell to?
How do they buy?
Where are they?**

Great companies become great by knowing who their customers are. A great digital transformation has to start with that ideal and work toward making customers the center of every decision made. Why do they buy? Who do they buy from? What are their pain points? How do they feel about this purchase?

Place yourself in the shoes of a potential buyer and try to understand not just the rational driver, but the emotions that create a purchase.

SHARE

WHAT DOES YOUR CUSTOMER LOOK LIKE?

While no two customers are identical, they likely share some common traits and characteristics that make them easier to group into broad demographic segments. Finding those characteristics and patterns, in turn, will help you tailor your messaging, outreach, appearance — everything about your marketing — to make your brand irresistible to your target market. Follow our template to create three primary customer groups you can keep in mind when working on your digital transformation. Focus especially on what (do they buy), when (do they purchase in their journey), why (do they pick your product), and where (can you reach them).

EXAMPLE:

Name: Young and Hungry
Age: 18-25
Locations: College campuses and cool neighborhoods in large cities
Income: Under $50K
Education: Some College and College Grads (often advanced degrees)
Career: Creative professions, office jobs, entry-level
Key Characteristics: Adventurous and open to new experiences, socially and environmentally conscious
Preferred Channels: Instagram, Reddit, Medium
Key Needs: Social validation, affordability, discovery
Typical Purchase (Items and Quantities): 1 T-shirt every 2-3 months

Name: _____
Age: _____
Locations: _____
Income: _____
Education: _____
Career: _____
Key Characteristics _____
_____
Preferred Channels: _____
_____
Key Needs: _____
_____
Typical Purchase (Items and Quantities)**:**
_____

Name: _____
Age: _____
Locations: _____
Income: _____
Education: _____
Career: _____
Key Characteristics: _____
_____
Preferred Channels: _____
_____
Key Needs: _____
_____
Typical Purchase (Items and Quantities)**:**
_____

Name: _____
Age: _____
Locations: _____
Income: _____
Education: _____
Career: _____
Key Characteristics: _____
_____
Preferred Channels: _____
_____
Key Needs: _____
_____
Typical Purchase (Items and Quantities)**:**
_____

COMPANY

Understanding where you're starting is just as important as understanding where you're going. Before you can chart a plan for a digital transformation, you need to answer the question of where you are right now.

As you work on this section, remember that being honest with yourself about your current capabilities is of utmost importance. You won't be able to improve if you don't acknowledge the things that need improvement.

PERFORM A SWOT ANALYSIS ON YOURSELF

Just like performing a SWOT analysis on your competitors will let you know where your opportunities to overtake them are, performing one on yourself will help you understand where you need the most work internally. By identifying your biggest opportunities for growth, you'll be able to put together a plan that takes advantage of your existing strengths. Identifying your threats, on the other hand, will help you figure out where you can shore up your brand to mitigate risk.

STRENGTHS	OPPORTUNITIES
WEAKNESSES	THREATS

TAKE A DIGITAL INVENTORY

What are we doing?
What aren't we doing?

Even the most technology-averse companies have some digital presence these days, and most brands have a smattering of various initiatives and activities they started over the years. Take a full digital inventory of your existing initiatives, even if they aren't actively managed or were started in an ad hoc fashion. This can serve as your foundation and will provide some of the raw materials you can use as you work towards a unified digital transformation. Also, note any obvious gaps in your existing digital efforts that need to be filled.

☐ **Do you own every domain associated with your brand or trademark?**

☐ **Do you own social pages for your primary brand name or trademark across major platforms?**

- ☐ Facebook
- Instagram
- SnapChat
- LinkedIn
- Twitter
- Pinterest
- Google Local Business Page
- Youtube
- ☐ Vimeo
- TikTok
- WhatsApp
- Weibo*
- Wechat*
- VK**

☐ **Do you (or have you) run digital advertising?**

- Cost per click
- ☐ Display ads
- Native ads
- Social ads
- Video ads
- ☐ Direct placement

☐ **Do you have a company blog or other place to post owned content?**

☐ **Do you use email to communicate with your customers?**

- Email newsletter
- ☐ Promotional emails
- Transactional emails

☐ **Do you or have you ever partnered with influencers to promote your brand or product?**

☐ **Do you track your SEO performance?**

☐ **Do you have digital analytics set up?**

- Do you monitor your digital analytics regularly?
- Do you report on your digital analytics?

☐ **Do you use any marketing automation?**

- Nurture campaigns
- ☐ Retargeting
- ☐ Cross-channel/ omnichannel campaigns

☐ **Do you have a digital asset library?**

☐ **Do you have a unified data store for customer data?**

*if you do/plan to do business in China   **if you do/plan to do business in Russia

TRANSFORMATION PLAN

You've seen the asteroid hurtling toward you. You've taken a thorough look at your environment and yourself, and you have an inventory of the tools at hand. It's time to figure out how you're going to survive and thrive through the impact.

This section is the strategic part of your plan. Don't worry about the tactics for now. Instead, focus on the high level — what do we want to accomplish and how can we do it?

OUR DIGITAL TRANSFORMATION VISION STATEMENT IS:

> "We are a _____ who do _____ for _____.
> In two years, we will _____ in order to _____."

The vision statement is more than a corporate thought exercise. It is the singular guiding principle that will focus your digital transformation; the north star by which you'll navigate being a digital-first company.

Your digital transformation vision statement doesn't need to be the same as your overall brand vision statement, but it should be inspired by and take into account your overall mission and vision.

It's also important to note the time frame. You can accomplish a lot in two years, but your vision should be realistic. You want a goal that is big enough that, unless you dedicate yourself to achieving this goal, failure is a real possibility.

Finally, you have to give some real thought as to why you are moving to digital-first. It's not enough to do it for the sake of doing it. Consider how it will help you to better serve your customers and expand your brand.

EXAMPLE:

TastyTee Co. is an apparel company that makes quality culinary-themed shirts for foodies and food lovers. In two years time, we will develop an in-house solution that links community shirt design, e-commerce, fulfillment, and customer service in order to improve overall customer satisfaction across all metrics, increase repeat business by 100%, and expand our capacity to release designs to 10 per month.

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EXECUTIVE BUY-IN PLAN

A digital transformation is impossible without buy-in from the entire company. That means getting the executive team on board. List out your executive team here, what you will need from each one (it's okay to be vague this early on), and how you plan on justifying the digital transformation to them. Make sure you touch on every major team in your company — you want everyone on board before you begin.

Name: _____

Title: _____

What I need from them:

How they would benefit:

Name: _____

Title: _____

What I need from them:

How they would benefit:

Name: _____

Title: _____

What I need from them:

How they would benefit:

Name: _____

Title: _____

What I need from them:

How they would benefit:

Name: _____

Title: _____

What I need from them:

How they would benefit:

Name: _____

Title: _____

What I need from them:

How they would benefit:

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CREATING A UNIFIED CUSTOMER EXPERIENCE

BRAND

What is your brand and how do you express it?

Creating a meaningful, unified customer experience begins with understanding exactly what your brand is and how it's communicated to your customers.

While working through this section, consider what your brand means for your target audience. How does it intersect with their values? What benefits does it provide customers? How do customers experience and understand your brand?

THE BIG BRAND CHECKLIST

Exploring exactly what your brand is and means is beyond the scope of this workbook, but there are still some things you need to line up to provide customers with a unified digital-first experience. One of the main things is a set of cohesive, unified brand guidelines. You need to make sure the brand experience your customers have is the same whether they find you on Facebook or in a mall. Use this checklist to make sure you have all of your brand ducks in a brand row!

As you go through this section, make a note of any elements that are outdated, don't fit your brand, or otherwise, need to go. The remaining list should be the foundation for your brand guidelines as you go through your digital transformation.

☐ **Do you have a brand promise?**

> Is it consistently communicated across your digital presence?

☐ **Do you have a brand color palette?**

> Are the colors expressed as HEX values, RGB, and Pantone?
>
> Are the brand colors used consistently across all digital materials?
>
> Are the brand colors communicated clearly to everyone in the company who might need them?
>
> Are brand colors used consistently on internal and external communications (e.g., email footers)?

☐ **Do you have a consistent logo?**

> Do you have variations of your logo for different applications (e.g., FB profile photo, Favicon, etc.)?
>
> Do you have guidelines for how to use the logo or modify it when necessary?
>
> Are these guidelines clearly communicated to all employees?

☐ **Do you have an image library or set of visual guidelines?**

> Does your packaging reflect your overall brand?
>
> Do you have photography or illustration guidelines for all brand collateral?
>
> Do your visual guidelines cover all likely channels you may participate across?

☐ **Do you have a brand voice?**

> Do you have rules for how the brand voice can change for different types of content (e.g., blog post vs. sales brochure)?
>
> Is the brand voice consistent across types of content?

☐ **Do you have branded templates for commonly used document formats?**

> PowerPoint
>
> Word Docs
>
> Letterhead
>
> Email header and footer
>
> Video/Podcast intros and outros

☐ **Do you have a product and personnel photo library?**

> Key employee headshots
>
> Consistent product photography
>
> Product photography guidelines
>
> Office photos
>
> Action/candid work photos

☐ **If you have physical locations, are they consistent with your digital branding?**

> Do you have a standard store layout?
>
> Do you have an interior design guide consistent with your digital presence?

☐ **If you attend trade shows/ conferences, is your presence consistent with your brand?**

> Booth colors, design, and layout
>
> Sales materials
>
> Promotional items and giveaways

CUSTOMER VALUES GUIDELINES

Every brand carries with it an explicit or implicit set of values and promises. These are the things that you believe you owe your customers, and what your customers expect from you.

In this section, write your brand values on the left, and use each one to create a customer engagement action that upholds that value. Unifying values with actions and experiences is exactly what a digital transformation is all about.

EXAMPLE: TastyTee Co.

Positivity → **We never use the word "no" with customers. If they have a support request, even if we can't fulfill it, we will find a positive, creative solution.**

VALUE → **ACTION**

VALUE → **ACTION**

VALUE → **ACTION**

CUSTOMER JOURNEY

The customer journey is the path your customers take from first discovering your brand to becoming lifelong customers. Understanding your customer journey is one of the most powerful tools in your digital transformation toolbox.

As you work through this section, consider how customers interact with your brand. How do they find you? How do they prefer to make purchases? How many touchpoints does it take? How do they prefer to be contacted?

SHARE

THE CUSTOMER FLYWHEEL

You may be familiar with the marketing funnel, or the sales pipeline, or the many other common ways to visualize lead progress. All of them have a bit of a problem — they fail to capture the modern brand-consumer relationship. Think about it: what happens to customers when they fall out of the bottom of the funnel? You don't simply abandon them and move on, right? And if your brand does everything right, your existing customers help drive the creation of new customers. In fact, if you constantly monitor and improve your sales, marketing, and service, you should be generating more momentum and growth with every customer you add. Enter: the customer flywheel.

The flywheel is a great model to replace the funnel. Instead of making customers an endproduct, it puts them right at the center of everything you do. As with a real flywheel, the customer flywheel stores energy — which you can use to power your growth. There are three ways to add energy to your flywheel: you can spin it faster, propelling customers through the stages more rapidly; you can reduce resistance and overcome pain points your customers are experiencing; you can add mass to the flywheel by doing more of everything.

Thinking about your efforts as a flywheel helps you to think about what your entire company (not just marketing) offers customers. As you work through your digital transformation, always think to yourself: "How do we put customers at the center? How do we add momentum? How do we use our existing customers to gain new customers?"

THE CUSTOMER JOURNEY: BEFORE THE BUY

What happens before a lead becomes a customer? Better yet, what happens before a stranger becomes a lead? This part of the customer journey is what traditionally has been seen as the sales funnel — how do you attract and engage people to fall in love with your brand and eventually purchase something?

It's impossible to capture the entire customer journey in one place, so instead focus on major milestones. Break out your user journey into a few discrete steps: how do they learn about you? What's the first point of contact? What's the step right before conversion? Then look at what channels dominate that step, what the customer pain points are, and what kind of roadblocks may prevent them from moving forward. Remember, the more friction you remove from your flywheel, the faster it spins, and the more momentum you pick up.

		STEP 1	STEP 2	STEP 3	STEP 4	STEP 5	CONVERSION	STEP 7	STEP 8	STEP 9	STEP 10
ACTIONS	What is the customer doing that tells me he's at this stage?										
	What channel is the customer engaging on?										
	What KPI has the customer hit?										
INTANGIBLES	How does the customer feel?										
	What is motivating the customer at this step?										
	What are the customer's biggest pain points?										
	What's keeping them from moving to the next step?										
RESPONSES	What can we do to help overcome objections and fears?										
	How do our values align with the customers' feelings?										
	How do our product features address the customer's pain points?										
	What channels can we reach the customer on?										
	What opportunities exist to push the customer to the next step?										

Running out of space for your customer journey map? **You can download our digital journey roadmap from Google Sheets here!**

THE CUSTOMER JOURNEY: AFTER THE BUY

Where a traditional funnel would end after purchase, the flywheel is just getting started. This is your opportunity to turn a customer into a lifelong brand advocate, and transform a transaction into a relationship. Think about what kinds of things a digital transformation can allow you to accomplish that will nurture customers and build on an initial purchase. How can you use that first buy to speed up and energize your flywheel, and your entire brand?

	STEP 1	STEP 2	STEP 3	STEP 4	STEP 5	SECOND PURCHASE OR BRAND RECCOMMENDATION	STEP 7	STEP 8	STEP 9	STEP 10
ACTIONS										
What is the customer doing that tells me he's at this stage?										
What channel is the customer engaging on?										
What KPI has the customer hit?										
INTANGIBLES										
How does the customer feel?										
What is motivating the customer at this step?										
What are the customer's biggest pain points?										
What's keeping them from moving to the next step?										
RESPONSES										
What can we do to help overcome objections and fears?										
How do our values align with the customers' feelings?										
How do our product features address the customer's pain points?										
What channels can we reach the customer on?										
What opportunities exist to push the customer to the next step?										

Running out of space for your customer journey map? **You can download our digital journey roadmap from Google Sheets here!**

TECHNICAL

A digital transformation isn't going to get far without the right brand infrastructure in place. Use the information you put together earlier in the customer and brand sections to identify what digital tools and channels you need to have ready.

While working through this section, think about where your customers and potential customers are likely to hang out. What channels do they use? What kind of interactions do they prefer? What media do they consume and how do they consume it?

CHANNELS: INVENTORY & PLAN

Are all the channels you need set up and ready for deployment? What technologies will you need to add, and around what time frame? Make a list of the channels your customers can be primarily found on, and identify the ones that are ready to go and which ones need to be created or optimized. Identify how quickly you will need to make changes to your channel infrastructure in order to meet your digital transformation goals, who will be in charge of deployment, and what needs to be done.

Channel	Created	Brand Compliant	Regularly Updated	Next Steps	Due Date	Responsible	Notes
TastyTee Co. Facebook	Yes	No	No	Create update plan and begin posting regularly	6/4	Mike (community manager)	Old logo in profile photo. Change.

DATA INTEGRATION

We've all had an experience when we hit a roadblock because a brand didn't have the information on us that we felt it should have. Maybe it was a customer service rep that couldn't find your recent order, or a retargeting campaign that kept showing you ads for a leaf blower you already purchased, or the inability to return/exchange e-commerce orders at a store. Whatever your situation, you know how frustrating an unconnected data infrastructure can be.

One of the keys to a successful digital transformation is the ability to pass customer information from department to department, and from channel to channel. Being digital-first is more about this ability to juggle customer data than it is about having a flashy website. Find out what kind of data your company has on customers and how it's stored and shared. Do you have a central data warehouse? Is data sharing automatic? Do all the departments know what data is available? Some best practices to consider:
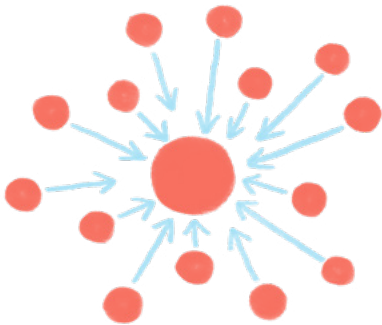
Unify data collection

Make a standard template for the kinds of customer data you want to (or that you do) collect, and make sure every department follows it. You should prioritize fields and provide several default templates for collection forms (something like "short, medium, and long"). Standardizing the collection and storage of data not only helps keep you compliant with critical data security legislation like GDPR, but it also makes sure everyone is working with the same information in the same format, making data sharing much simpler.
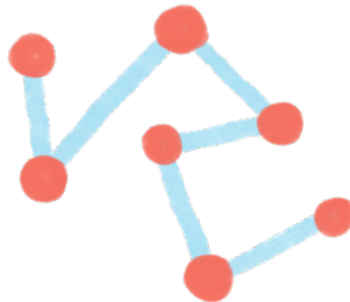
Create a data-sharing map

After you have a customer data standard, list out which departments might need access to each piece of data, and in what circumstance. Work with your IT team to figure out if everyone you have listed on each piece of information actually has access, and how to grant them access if they don't.
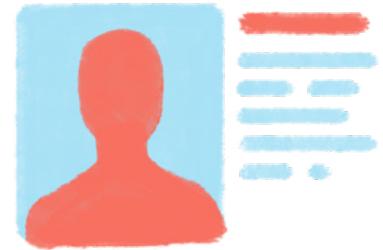
Build tools to make personalization easy

Ultimately, a tool is only as good as its ease of use. If it's hard for retail clerks to find a customer's size from past orders, they may be more likely to simply tell customers it can't be done. Make sure that every tool used in any customer facing capacity makes it easy to access your central datastore and find relevant data quickly.

TRAINING & RESOURCING

What's your implementation budget and how will you get your organization ready?

It takes people to make your digital transformation work. Those people need to be provisioned, trained, and paid.

In this section, consider the human resources you will need to execute on your transformation plans. How many people will you need? What skills should they have? Do those people already exist in your organization, or will you need to find them? And how much money will you have to hire and train these people if needed?

RESOURCE CHECKLIST

What are you capable of now and what will you need to succeed? Even with limited digital efforts, most brands have some resources they can use to help push a digital transformation forward. These resources may include talented employees, existing budget, IT infrastructure, tools and equipment, or just a burning passion for digital initiatives. Whatever they are, write them down as you work through this checklist.

Employees	Have	Need	Cost	Next Steps	Notes
TastyTee Co. Community Mgr.	1	1	$60,000/ year	Mike: Meet to discuss updated roles and responsibilities	

Infrastructure	Have	Need	Cost	Next Steps	Notes
TastyTee Co. Website	1	1	$150/ year	Consider upgrading hosting to get faster load times	SomeHost .com

Platforms & Software	Have	Need	Cost	Next Steps	Notes
TastyTee Co. Email Platform	0	1	$120/ year	Identify some options. Consider MailMonkey, AlwaysContact, and CenterPlace	

TRAINING PLAN

A digital transformation isn't just a marketing campaign: it's a company-wide cultural shift that puts customers front and center. And like any big change to company culture, it needs to be nurtured and instilled in your people. A digital transformation training plan should make customer-first more than just a catchphrase; it should make it integral to company culture.

Enlist and Empower

Task every employee with coming up with initiatives and give them the power to execute.
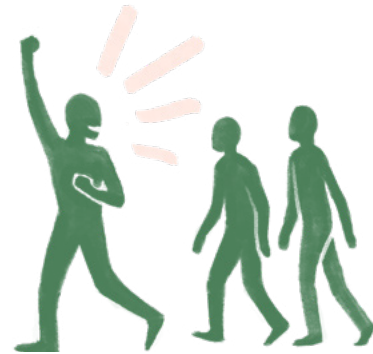
Lead By Example

Make sure every team leader, manager, director, and executive is 100% on board and modeling the behavior they want to see.

Share Successes, Learn From Failures

Have regular formal or informal meetings to share the successes you achieve. If you fall short, use it as a teaching tool instead of assigning blame.

Have A Skills Checklist

Put together a list of skills your company will need to be an effective digital-first brand, and break them down by department. Work with your department point people to create individual training plans for every group.

DIGITAL-FIRST COMMUNICATIONS AND MARKETING

DIGITAL READINESS

Your brand probably already has more than a few digital initiatives in place. Some of them may have been created as part of an organized campaign, many were likely put together on an ad-hoc basis by a long procession of marketing managers, directors, and officers.

In this section, we take a more in-depth look at the pieces you have in play and how they can be used for a digital transformation.

WEBSITE AUDIT

As an owned channel, your website is one of the few pieces of digital content that you can say is truly under your control. That means it needs to be on point and operating as well as it can at all times. Your website should be the crown jewel in your digital transformation, so take a minute to do a thorough website audit to make sure that everything is ready to go and to identify areas for improvement:

- [ ] **Desktop site loads in** _____ **seconds**

- [ ] **Mobile site loads in** _____ **seconds**

- [ ] **Website is mobile friendly**

- [ ] **Contact information is accurate and forms work**

- [ ] **Pages with minimal traffic or purpose are removed**

- [ ] **All internal links work and go to correct page**

- [ ] **All website functionality works across top common browsers**

- [ ] **Privacy/GDPR/etc. pages are clearly linked to and are accurate and up to date**

- [ ] **Website appears first in Google for brand name**

- [ ] **Every major page is built around a specific keyword**

    H1 tags, page titles, and URLs are correct and contain the keyword or phrase

    Canonical tags are configured, duplicate content is minimized

- [ ] **Backlinks pointing to site are legitimate and bad backlinks are removed/disavowed**

- [ ] **UX and UI is optimized for conversion**

    Navigation is clear, concise, and accurate

    User flow is clear and doesn't create roadblocks

INBOUND AUDIT

How do you get people to your website? Paid media is one option, but any real digital transformation has to be centered around an inbound plan. After all, your goal is to put the customer front and center, and that means giving the customer value even if they don't immediately buy.

☐ **Do you have a blog?**

   Is it well organized, and easy to navigate?

   Is it updated regularly?

   Is the content optimized for search?

☐ **Is your content plan built around target personas and buyer journey stages?**

☐ **Do you have a content calendar to organize topics and publish dates?**

☐ **Do you have a content distribution plan?**

☐ **Go through any existing content you may have using the template below and identify what worked and what didn't.**

Title	Topic	Customer Journey Stage	Target Audience	Why should they care?	Additional Notes

PAID MEDIA AUDIT

Paid media covers a lot of ground — from search to display to native to social to people on street corners spinning arrows. Since this is the digital part of this e-book, we'll ignore the arrow spinning guy. Instead, think about how your paid media reflects your brand values and helps customers find your products and overcome obstacles. Consider where your audience is, and what they're looking for. Are you meeting them where you are, or just shouting from a rooftop?

Targeting

- Location is set and correct
- Demographic and audiences are set and correct
- Device targeting is set and correct
- Channels are selected and correct

Bids and Budgets

- Are you missing out on conversions because of budget?
- Are your bids adjusted to prioritize your objectives?

Segmentation

- Are your ads segmented by customer profile and stage in the buyer journey?
- Is the right ad getting to the right customer at the right time?

Ad Creative

- Do you have a testing and improvement plan for ad creative?
- Do you have multiple ad formats, and do you match them to customer preference?
- Do your ads provide value to your audience?

DIGITAL STRATEGY

You've got your resources in place, you know where you're starting from. By now, you should also have an idea of where you want to end up. The big question now is how do you get there? The comet is getting closer — it's time to figure out how you get out of the way!

In this section, you'll set some broad stroke plans for how you will address the marketing portion of your digital transformation.

WEBSITE PLAN

Look over your onsite audit and write out the items you missed or could improve on the left. Then make a plan to fix them. That means stating clearly how you will improve the situation, assign responsibility, and set a deadline for when the action needs to be completed by. Some items may require more than one action to fix, so feel free to use multiple lines.

Need	Next Steps	Who's Responsible	Deadline
TastyTee Co. currently uses generic 404 pages	Re-write 404 error pages to incorporate TastyTee Co.'s voice and tone	Mike (Community Manager)	3 weeks from now

CONTENT PLAN

The key to a true content transformation is to stop asking the question, "What do we want to say?" and start asking, "What does our audience want to hear?" More than that, it's about creating the kind of content that your audience wants to consume, and sending it out to the platforms and channels they want to consume it on. Use the customer profiles you put together earlier to create content profiles. Think about what topics each audience might be interested in, what medium they prefer, and what channels and platforms they may visit to see your content. Then, put together a content plan that outlines what you'll produce, how often, who will be in charge, and when it will start.

Content Type: Buying Stage: Title: Due:	Content Type: Buying Stage: Title: Due:	Content Type: Buying Stage: Title: Due:	Content Type: Buying Stage: Title: Due:	Content Type: Buying Stage: Title: Due:	Content Type: Buying Stage: Title: Due:

Theme: _____ Anchor: _____ Persona: _____

Theme: _____ Anchor: _____ Persona: _____

Theme: _____ Anchor: _____ Persona: _____

Content Type: Buying Stage: Title: Due:	Content Type: Buying Stage: Title: Due:	Content Type: Buying Stage: Title: Due:	Content Type: Buying Stage: Title: Due:	Content Type: Buying Stage: Title: Due:	Content Type: Buying Stage: Title: Due:

Draft Date	Publish Date	Keyword	Title	Description	Author /SME	Persona	Buying Stage	Notes
10/1/19	10/15/19	Halloween T-Shirts	The Scariest Halloween T-Shirts of 2019	A roundup of the scariest Halloween T-shirts we can find	Dan Smith, T-Shirt Designer	Young and Hungry	Bottom-of -funnel	Include hi-res shirt images with each example

PAID MEDIA PLAN

The goal of any effective paid media campaign is to meet your customers where they are already spending time, and remind them that you have a solution to one of their problems. This is where all that time and research you put in earlier in this workbook pays off. By creating customer profiles and understanding how they move through their buyer journey, you have all the tools you need to create a segmented plan for paid media. Use the worksheet to build a multi-channel approach for each audience, and evaluate your existing efforts for return on investment (ROI). Return to this sheet regularly to reevaluate as you gather results.

AUDIENCE: _____

Channel	C. Journey Stage	Spend	ROI	Spend Adjustment	Additional Notes

AUDIENCE: _____

Channel	C. Journey Stage	Spend	ROI	Spend Adjustment	Additional Notes

AUDIENCE: _____

Channel	C. Journey Stage	Spend	ROI	Spend Adjustment	Additional Notes

AUDIENCE: _____

Channel	C. Journey Stage	Spend	ROI	Spend Adjustment	Additional Notes

OUTBOUND & AUTOMATION

How do you keep customers engaged after they become a lead, or even after they make a purchase? Outbound. Combined with smart automation, outbound can nurture prospective customers, get existing customers to purchase more, and turn former customers into brand evangelists.

In this section, think about what information you have on customers, and how can you use it to get closer to them.

ACCOUNTS AND LISTS

A customer list can be one of the most valuable assets in a marketer's toolbox. A well-managed and segmented list is the most valuable. Segmenting your lists allows you to target them more precisely, giving every customer group exactly what they're looking for, exactly when they're looking for it. Segmenting takes many shapes, from demography-based to action-based. You've already identified some segments by creating three ideal profiles and breaking out customer journeys. Now, you can use this information to create combined persona- and stage-based segments, and figure out how to best identify and approach them. Give it a shot — combine a persona with a stage in the buyer journey, and identify some specific characteristics and metrics you can use to find them in your list. Then, add a short, actionable sentence of how you plan to move them to the next buying stage.

EXAMPLE:

Profile: Young and Hungry

Buying Stage: Pre-Purchase

Segment Signals: Has account, added shirt with size to shopping cart, did not begin checkout

Next Step: May be worried about budget, send email with 10% off coupon if purchased in next 48 hours, and add to retargeting list for their t-shirt.

Profile: _____

Buying Stage: _____

Segment Signals: _____
_____
_____
_____

Next Step: _____
_____
_____
_____

Profile: _____

Buying Stage: _____

Segment Signals: _____
_____
_____

Next Step: _____
_____
_____

Profile: _____

Buying Stage: _____

Segment Signals: _____
_____
_____

Next Step: _____
_____
_____

AUTOMATION

No matter how often marketers submit a request for an unlimited hiring budget, the odds of it actually happening remain slim to none. Instead, we turn to automation to increase the effectiveness of our marketing. By offloading some of the more basic and rote marketing tasks to algorithms, marketing automation frees marketers to focus on high-level tasks instead of getting mired in day-to-day minutiae.

But all automation isn't created equal and can be broken down to basic automation and advanced automation. Basic automation allows you to use some common tools to perform simple tasks like sorting lists or sending out emails. Advanced automation typically requires more specialized (and costly) software, but can turn entire processes into simple rules that are executed in the background — sorting a list AND placing individuals into different segments dynamically AND selecting the right email to send to them at the right time AND making some kind of decision based on how that email is received.

Part of any successful digital transformation is automating as much of the tedious and simple marketing activity as possible. Automation gives you the power to scale — to run a leaner marketing program while allowing you the time to focus on higher-order activities. But most importantly, it actually enables you to provide customers with a more personal, tailored touch than you would be able to manage if everything was done manually. A well-planned marketing automation program gives you the tools to make every customer feel unique and special, like you are speaking directly to them and them alone. That, in turn, results in more conversions and better revenue. Everyone wins.

SHARE

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MEASUREMENT AND SNOWBALLING

GOALS & KPIs

It's hard to hit a target you aren't aiming for, so having goals for your digital transformation is a must. Having strong goals is even better. Not only will goals and KPIs help guide your progress, but they'll help you evaluate initiatives and campaigns and allow you to make intelligent adjustments where needed.

As you work through this section, think about how your ideas can be tracked, measured, and reported.

OBJECTIVES, GOALS, KPIs, & REPORTING

What are your overall objectives for your digital transformation? An objective is a long-term desired outcome, usually written in plain language, that imagines what your ideal end state looks like. A good objective can be tied to metrics, but doesn't need to be — this is your opportunity to paint big ideas with a broad brush. A good example of an objective is, "In two years, our brand will get most of our business through digital initiatives."

Once you have some objectives, you need to create goals to support them. Unlike an objective, a goal has definitive success criteria. We tend to like the SMART Goals framework. A goal should be:

S **Specific:** The goal should clearly address why the goal exists, when it needs to be accomplished, what you're trying to accomplish, and who is responsible.

M **Measurable:** The goal should be quantifiable and linked to concrete metrics, and ideally supported by one or more KPIs.

A **Achievable:** The goal should push you to do better while still being realistically doable. Goals that aren't achievable will only serve to demotivate.

R **Relevant:** The goal should be tied to a larger objective and readers should be able to clearly see how it supports the company as a whole.

T **Time-bound:** The goal should have a clear and well-defined time frame, including when the goal takes effect and when it needs to be completed.

Each goal, in turn, should have at least one KPI associated with it. KPIs are short-term indicators of how well a specific activity is performing. The KPIs are what you will regularly monitor and report, and will be the pulse check of how progress towards your goals and objectives are going.

In addition to setting goals and objectives, you will also want to note the reporting period for each step and who it will be reported to. Remember that, unless you have a very small team, not everyone will need to know every single KPI, so try to make sure that every report is relevant and meaningful.

OBJECTIVES, GOALS, KPIs, & REPORTING
(CONTINUED)

Objective	Goal	KPI	Due Date	Responsi-bility	Reporting Period	Reported To	Notes
TastyTee Co. will get most of our business through digital initiatives			Within 2 years	Everyone	Annually	Senior Exec. Team	
	TastyTee Co. will grow digital revenues by 5X over the next year		1 year	Marketing	Quarterly	VP, Marketing; Chief Commercial Officer	Excluding revenues from retail distribution, even through digital sources
		Website Visitors		Outbound team	Monthly	Director, Digital	
		Digital sales		Laura, Ecommerce Analyst	Weekly	Director, Digital; Director, Ecommerce	
		Average order size		Laura, Ecommerce Analyst	Weekly	Director, Digital; Director, Ecommerce	

MEASUREMENT & ATTRIBUTION

How do you know if your campaigns and initiatives are working? Having the right measurement tools and being able to attribute results to activities allows you to claim victory when you are making a positive impact, and fix problems when they arise.

As you work through this section, think about how you evaluate the effectiveness of what you're doing, and how you would like it evaluated by others.
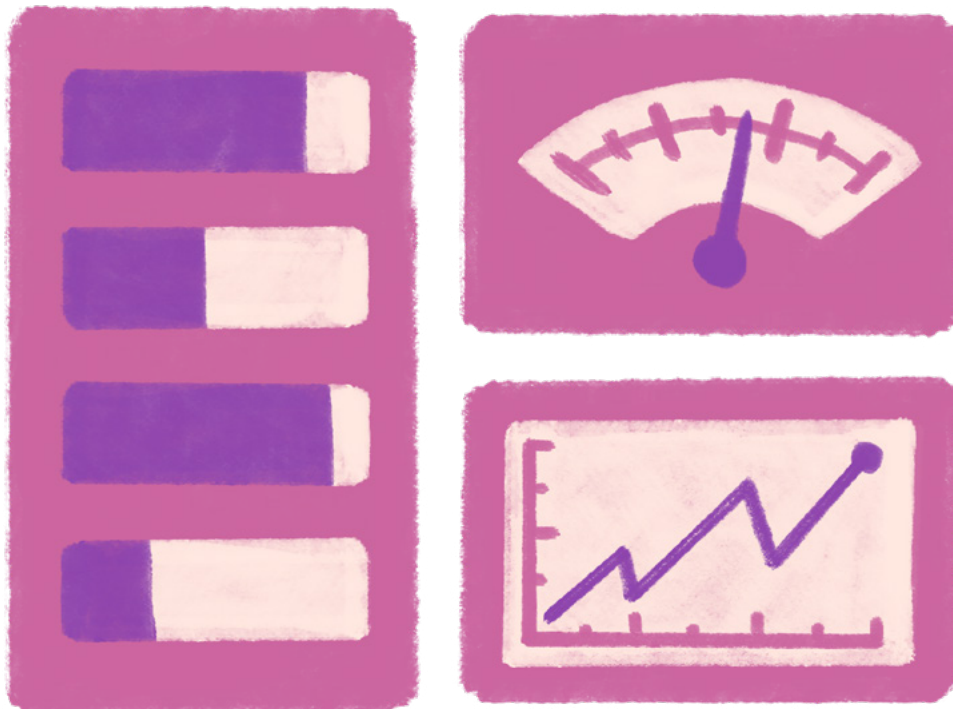
MEASURING KPIs

Now that you've set goals, objectives, and KPIs, you need some way of measuring them. The tools you use will depend largely on the platforms you use, the KPIs to measure, and your budget. Ideally, you will want to measure EVERYTHING. Even more ideally, you will want to measure everything and bring it all together so that data from one platform or channel is matched to data from another. That isn't always possible, especially for brands operating on a strict budget, but it should always be the goal. You should, at the very least, have the ability to count the people who come to your website and identify what actions they took. Here are some suggestions on additional analytics tools you may find useful.

Website

Google Analytics
Woopra
Clicky
KissMetrics
CrazyEgg
Mouseflow
Chartbeat

Social

Keyhole
Agorapulse
Unionmetrics
SumAll
Quintly
☐ RivalIQ
☐ Brand24

Email

Email Analytics
Email on Acid
Litmus
Shiftmail

Customer Support

Looker
Sisense
Revuze
Blueshift

Paid Media

AdRoll
AdStage
AdWords Analytics
Tapclicks

Data Aggregation

Domo
Supermetrics

Display and Reporting

Tableau
Google Visual Studio

PR and Media

☐ Meltwater
☐ Cision
☐ Trendkite
☐ Brand Mentions

ATTRIBUTION MODELING

GLOSSARY:

Look-Back Window: The period of time before the conversion happens in which touchpoints are attributed to that conversion (read more)

Touchpoint: Any interaction between a potential customer and your brand, whether a click, a like, or a view.

Collecting data is great, but eventually, someone will ask you to make sense of it all. Linking initiatives to customer actions to business goals is the process of attribution. A deep dive into attribution may be beyond the scope of this workbook, but it's important to at least familiarize yourself with the basic types of attribution models. Attribution models allow you to assign value to every touchpoint that your customer makes on their buyer journey, with different models giving different values to touchpoints based on proximity to a conversion or other criteria.

Single Touch

The simplest type of attribution model gives the full value of the conversion to a single touchpoint. Typically, this is the last touchpoint before a conversion, or the first one — this is why it's often referred to as a last click or first click model.

Pros: This is the easiest model to use and understand. It rarely requires any specialized tools or software to measure, and is often "right enough" for people just starting with data modelling.

Cons: The single touch attribution model doesn't give you any details on the customer journey. The average customer requires 6+ touchpoints before buying something, and this model doesn't give any value to 5+ of them.

Linear Attribution

A linear attribution model is the simplest of the multi-touch models, and assigns an equal proportion of the conversion value to every touchpoint in the look-back window. Each touchpoint becomes worth exactly the same amount.

Pros: Captures all of the touchpoints in the look-back window. Gives you values for all or most of your initiatives. Much more informative than single-touch.

Cons: Overly simplistic. The weights are assigned equally for each step, and the model does not actually evaluate the importance of the step.

Time Decay

The first robust attribution model, the time decay model gives the most value to the last touch, slightly less to the touch before it, a little less to the one before that, etc. Think of it as a staircase of value attribution.

Pros: More robust than single touch, more accurate than linear attribution. Makes sense intuitively — it fits the common-sense model that touchpoints become less important as you go back in time.

Cons: Still more simplistic than the reality of the customer journey. Static values for each touchpoint may not weigh touchpoints with accuracy. Proximity is not necessarily equal to importance.

Dynamic

A dynamic attribution model uses algorithms or AI to assign weight to each touchpoint based on a series of calculations. This model uses historical data and other signals to constantly shift value attribution.

Pros: The most robust and intuitive of models. Gives the difficult task of determining touchpoint value to a computer. Much more accurate than static models. Can change in response to customer behavior.

Cons: Can be difficult to implement. Often requires relatively expensive software. Can be inaccurate if misconfigured.

Bonus Note: Check out the attribution section of our **holiday engagement white paper**.

TURNING GROWTH INTO MORE GROWTH

By monitoring your successes and improving on your failures, you can turn your initial growth into more and more growth. That requires understanding what success looks like, and knowing how to replicate it. It also requires having a structure for making those improvements.

In this section, consider how everything you've learned links back to the flywheel, and how you can improve on it in the next iteration.
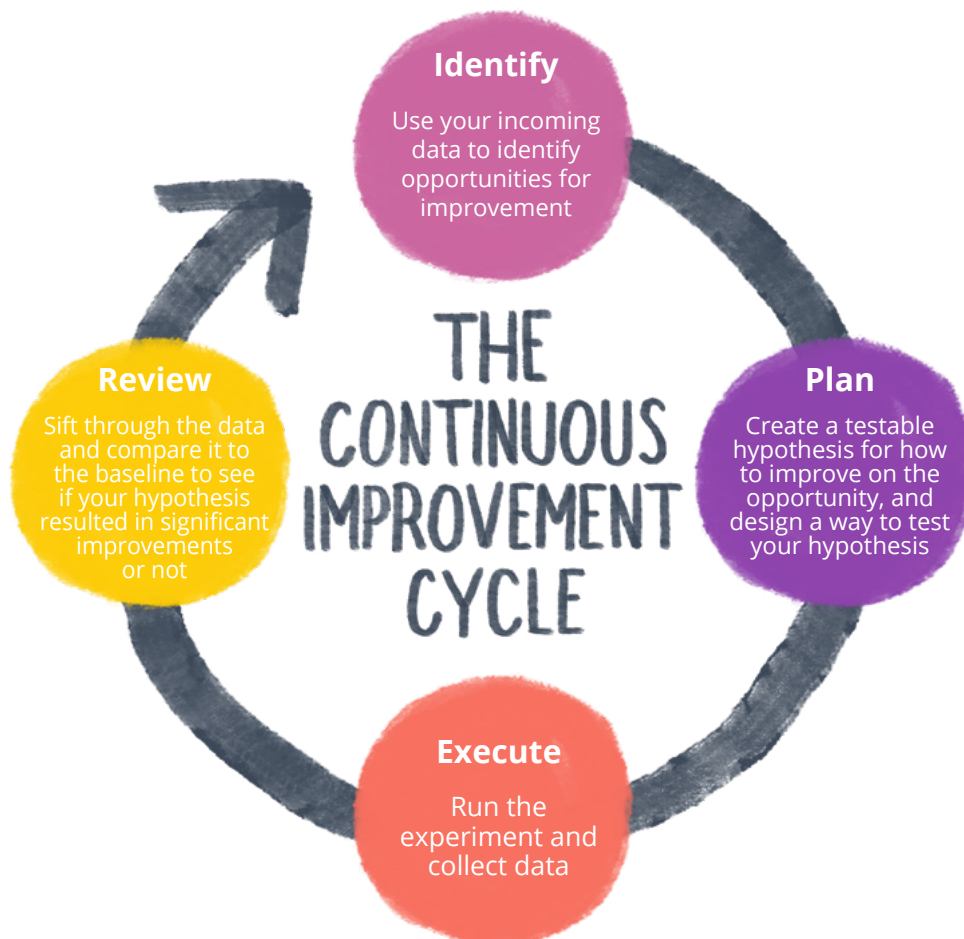
CONTINUOUS IMPROVEMENT

You've launched a lot of initiatives by now, and collected and measured results. Now it's time to evaluate and improve. The continuous improvement process is a term borrowed from manufacturing, where small improvements in process could yield huge improvements in revenue. Your marketing is the same way — a small change can mean big improvements, and a lot of small changes add up to a full digital transformation!

This is where the continuous improvement process comes in. It answers the question: how do you manage these changes, how do you ensure that they are all beneficial, and how do you build a culture of constant improvement and change.

THE CONTINUOUS IMPROVEMENT CYCLE

Identify
Use your incoming data to identify opportunities for improvement

Plan
Create a testable hypothesis for how to improve on the opportunity, and design a way to test your hypothesis

Execute
Run the experiment and collect data

Review
Sift through the data and compare it to the baseline to see if your hypothesis resulted in significant improvements or not

GROWTH, MOMENTUM, & THE FLYWHEEL

We're almost finished, and it's time to bring everything back full circle to the marketing flywheel. Remember that a flywheel is a device to store energy by spinning. That energy is used to create growth and drive revenue. You can increase the energy by increasing the number of customers you have (increasing size); increasing the scope and size of your marketing, sales, and customer service initiatives (increasing speed); and reducing the pain points and difficulties your customers face (reducing friction).

As you execute your digital transformation plan, you will focus on removing friction and increasing speed. Hopefully, this will lead to growth. So how do you use this growth to create more growth? By turning your customers into an asset. Look back to the post-purchase customer journey map you made earlier — does it take full advantage of your customers, or can you add some of these techniques to build on past success?

THE NEXT TWO MONTHS

That's it! You've audited, reviewed, planned, and deliberated your way through the whole workbook. So the last question is, "What are you doing right now?" The first two months of any new initiative are always the diciest. Excitement can fade quickly when presented with the reality of handling your day-to-day tasks while also managing a major undertaking like a digital transformation.

The best way to push back against this inertia is to create a plan and hold yourself accountable. Set objectives and goals for the next two months, and keep track with KPIs.

Thanks for reading our digital transformation guide. We hope it was useful, insightful, and interesting. If you enjoyed reading this, share it with everyone you know on **LinkedIn**, **Twitter**, or **Facebook**.

AdRoll

AdRoll levels the playing field for underdog, D2C brands by empowering them to grow their business and control their own destiny in today's ever-evolving marketplace. Powered by machine learning and more than a decade of data, the AdRoll Growth Marketing Platform serves as mission control — unifying all data, channels, and measurement — so D2C brands can reach the right customer at the right time. 37,000 customers globally use AdRoll to personalize, coordinate, and evaluate their cross-channel marketing efforts. AdRoll is a division of NextRoll Inc. and is headquartered in San Francisco, with offices in Dublin, New York City, Salt Lake City, and Sydney.

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