3 DIGITAL "PRE-PROJECTS"

To tackle before you're "ready" for digital

Build a relationship with marketing

Forming strong cross-functional collaboration takes time. A strong level of mutual trust will be critical when you are ready to start building, so get to know them early. Bonus: getting to know their tech stack may also come in handy later.

Create a communication inventory

Document every automated or bulk message currently being sent to your customers, regardless of department. Note the purpose, audience, channel/delivery method, internal owner, internal system, and trigger for each.

Identify a proof of concept (POC)

Where will you start when you are ready? While most start rolling out digital with their smallest customers, I prefer a POC or pilot around onboarding for customers from all segments.