ACCION DIGITAL TRANSFORMATION CHECKLIST

Digital transformation should be a holistic approach that supersedes any one product, business function, or initiative. It is the catalyst through which the organization evolves into an insight-driven and agile enterprise that operates efficiently at scale.

Acción’s Digital Transformation Framework provides a clear and consistent tool for organizations for use in benchmarking, assessing the current state and planning a roadmap to guide the business’ digital evolution.

This checklist will help organizations quickly identify their critical gaps and assess the organization’s current state of readiness for digital transformation. To use this assessment, check the box next to every statement that applies to your organization.

1. ORGANIZATION STRATEGY

☐ Does your organization's strategy rely on the use of digital tools, products and/or services?
☐ Do you have a digital strategy that outlines how the organization will acquire new customers / operate more efficiently / drive internal performance by using digital tools?
☐ Has the digital strategy — where it exists — been communicated to all staff?
☐ Is there adequate funding allocated to your digital initiatives?
☐ Does your organization collaborate with external parties (e.g. for new ideas, to understand customers better) as part of the product/service design process?

2. CUSTOMER EXPERIENCE

☐ Does your organization have an accurate and detailed view of customers across the various engagement points (e.g. transaction history, demographics, support issues/complaints, product purchase, etc.)?
☐ Do you engage and interact with your customers using multiple channels (e.g. Physical, Mobile App, Contact Center, online, etc.)?
☐ Do each of your channels provide a consistent and similar customer experience (e.g. look & feel, functionality available, languages used, etc.)?

3. PEOPLE AND PROCESS

☐ Do the majority of employees have access to digital tools such as email, mobile apps, web applications for their daily communications and functions?
☐ Do the majority of employees use digital tools such as email, mobile apps, web applications for their daily communications and functions?
☐ Are employee functions such as recruitment, leave management, performance reviews, etc. largely done using digital applications/tools?

4. DATA & TECHNOLOGY

☐ Does your organization make critical product, performance, or other strategic decisions using detailed reports/data/research?
☐ Do your IT systems offer/provide more functionality and services than you currently use or need?
☐ Does the technology you've deployed/use include two or more of the following: Digital Financial Apps; Robotics; Artificial Intelligence; Chatbots; Internet of Things (IoT); Customer Data Analytics?
☐ Does senior management have a high confidence in the quality and accuracy of the data produced by your systems?
☐ Do you have a business intelligence and analytics tool such as PowerBI, Oracle BI, etc.?
☐ Are the reports produced by your systems used to support critical management decisions?

HOW TO EVALUATE YOUR DIGITAL MATURITY: add up all the YES/checked (√) answers. Each check mark = 1 point. Use the key below to assess your current state of digital maturity:

<table>
<thead>
<tr>
<th>Score</th>
<th>Level</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>0 - 4</td>
<td>Beginner</td>
<td>You are at the early stages of your digital journey. Digital tools, products and technologies do not appear to be a critical focus of your organization’s strategy, operations and customer engagement.</td>
</tr>
<tr>
<td>5 – 8</td>
<td>Explorer</td>
<td>You are starting to experiment with digital technologies in specific projects/functions/products; however, there is no concerted, enterprise-wide push to embed digital behaviors and technologies in all aspects of the business.</td>
</tr>
<tr>
<td>9 – 13</td>
<td>Leader</td>
<td>Congratulations! Your organization seems to be well on its way with digital transformation. While there are still gaps and improvements required, you are quite advanced in your use of digital technologies across the entire organization to drive productivity, innovation and superior performance.</td>
</tr>
<tr>
<td>14 – 16</td>
<td>Digital Native</td>
<td>Congratulations! You are well advanced in your digital maturity; focusing on continuous improvement to drive a scalable, agile business; with strategic goals and KPIs aligned with digital-first principles.</td>
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