

# Essential Digital Strategy Checklist

This checklist empowers SMBs to take the lead on their tech strategy while offering the option of engaging a **Fractional CTO** or a **tech consultant** if the process becomes too complex or requires specialized expertise.



## 1. Identify Key Pain Points

- **Goal**  
Pinpoint inefficiencies or challenges that technology can address.
- **Action Steps**
  1. Conduct a technical audit of tools, processes, and workflows.
  2. Map user flows to identify bottlenecks and inefficiencies.  
**Tools:** Lucidchart, Miro, or pen-and-paper diagrams for simpler mapping.
  3. Survey staff and customers to uncover recurring issues.  
**Tools:** Typeform, SurveyMonkey.

**Optional Support:**  
If mapping user flows or auditing systems feels overwhelming, consult a **Fractional CTO** or tech team to guide the analysis and ensure thorough results.



## 2. Evaluate Technology Needs

- **Goal**  
Determine whether off-the-shelf tools, custom integrations, or custom solutions are the best fit.
- **Action Steps**
  1. List all essential features and outcomes required for your business.
  2. Research potential tools and assess compatibility with existing systems.  
**Tools:** Smartsheet, Asana, or Trello etc. for organizing research.
  3. Consider scalability and ROI for each solution.

**Optional Support:**  
Engage a **tech consultant** to assist with:  

- Evaluating technical compatibility between systems.
- Prioritizing features and identifying cost-effective solutions.
- Developing a roadmap for technology adoption.



## 3. Plan for Integration or Development

- **Goal**  
Ensure smooth implementation of selected tools or solutions.
- **Action Steps**
  1. **Simple Needs:** Use integration platforms like **Zapier** or **Make (formerly Integromat)** to connect existing tools.
  2. **Complex Needs:** If custom integrations or development is required, define project goals, timelines, and budgets.  
**Example:** Integrating a CRM with an ERP system for seamless data sharing.
  3. Test integrations or software solutions before deployment.

**Optional Support:**  
For custom development or complex integrations, work with a **tech team** or development partner. They can:  

- Scope the project and develop custom solutions.
- Manage testing and deployment to ensure success.



## 4. Assess Total Cost of Ownership (TCO)

- **Goal**  
Evaluate the long-term costs and benefits of each solution.
- **Action Steps**
  1. Calculate upfront costs, operational costs, and potential savings for each tool.  
**Tools:** TCO calculators (Excel or Google Sheets templates).
  2. Compare off-the-shelf vs. custom software solutions based on ROI and scalability.
  3. Incorporate potential costs for maintenance, training, and future upgrades.

**Optional Support:**  
A **Fractional CTO** can provide expertise in evaluating TCO and ensuring that investments align with business goals.



## 5. Implementation and Monitoring

- **Goal**  
Roll out solutions effectively and measure their impact.
- **Action Steps**
  1. Assign internal team members to oversee implementation or collaborate with external partners.
  2. Train staff on using new tools and workflows.  
**Tools:** LinkedIn Learning, Udemy for training resources.
  3. Monitor KPIs to track success (e.g., time savings, cost reductions, improved customer satisfaction).  
**Tools:** Tableau, Power BI, or Google Analytics.

**Optional Support:**  
Engage a **tech consultant** if  

- Implementation becomes too resource-intensive.
- Expertise is needed for staff training or troubleshooting.



## 6. Optimize and Evolve

- **Goal**  
Continuously improve your tech strategy to stay competitive.
- **Action Steps**
  1. Schedule regular reviews of tool performance and ROI.
  2. Collect feedback from staff and customers to refine solutions.  
**Tools:** SurveyMonkey, Culture Amp.
  3. Experiment with emerging technologies (AI, IoT, blockchain) to explore additional improvements.

**Optional Support:**  
A **Fractional CTO** or tech consultant can:  

- Identify opportunities for optimization.
- Plan upgrades and align tech strategy with evolving business goals.

## Ready to Simplify Your Tech Strategy?

Let our Fractional CTO services handle the complexity, so you can focus on growing your business.

[Explore More](#)

## Benefits of Optional Tech Support

- **DIY Flexibility**  
SMBs can take charge of their strategy, using the provided tools and steps.
- **Expert Assistance When Needed**  
Fractional CTOs or consultants are available to step in if tasks become too complex.
- **Tailored Solutions**  
Professional guidance ensures tech investments deliver maximum ROI and align with business goals.