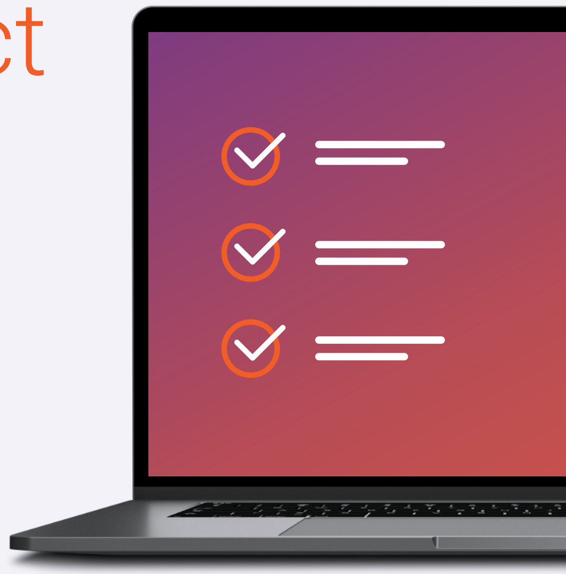
PROJECT PREPARATION

Preparing for a digital transformation project

A successful development project starts with thorough preparation



This checklist outlines essential details to gather internally before your project starts. Don't worry if some items seem technical; a dedicated agency partner will help clarify these details during the project's discovery and planning phase.

Providing as much information as possible upfront will ensure your vision is shared most effectively, supporting a seamless transition from project planning to design and development.

Business Objectives

Define the "why" behind the project to ensure every decision drives toward a strategic outcome.

- [ ] **Define project goals** – What specific business objectives do you aim to achieve? (e.g., improve operational efficiency, enable self-service ordering, optimize the supply chain, expand to new sales channels).
- [ ] **Prioritize goals** – If you have multiple goals, rank them in order of importance. What is the most critical outcome for an MVP (Minimum Viable Product)?
- [ ] **Define what's out of scope** – Clearly state what this project will not address. This prevents scope creep and focuses the team on the primary objectives.
- [ ] **Quantify success** – What are the specific metrics or KPIs for success? (e.g., reduce manual order entry by 30%, increase average order value by 10%, reduce customer service calls regarding order status by 50%).
- [ ] **Attach ROI metrics** – How will these goals contribute to tangible cost savings or revenue growth? (e.g., "Reducing manual entry by 30% will save X hours per week, translating to $Y annually").
- [ ] **Articulate the long-term vision** – Beyond this immediate project, where does your company's digital presence need to be in 3-5 years?

Project Stakeholders & Governance

List key users and stakeholders to guide the project's alignment with user needs and establish clear authority.

- ☐ **Identify the project sponsor** – Who is the executive-level champion with the ultimate authority to approve budgets and strategic decisions?
- ☐ **Identify the primary project lead** – Who is the day-to-day point of contact responsible for driving the project forward internally?
- ☐ **Identify internal users** – Who will manage, use, and benefit from the system? (e.g., sales, warehouse, accounting, marketing, and customer support teams).
- ☐ **Identify external users** – Who are the end-users? Be specific. (e.g., distributors, dealers, direct B2B customers, field sales reps, suppliers).
- ☐ **Map out the decision-making process** – Who has the authority to make decisions on specific areas (e.g., UX/design, technical architecture, budget)? How will conflicts be resolved?

Budget & Resource Allocation

Establish clear financial and personnel commitments for the project.

- ☐ **Define the project budget** – What is the approved budget for the initial project (e.g., discovery, design, development)?
- ☐ **Outline the annual operating budget** – What is the anticipated budget for ongoing licensing, maintenance, support, and future enhancements?
- ☐ **Allocate internal resources** – Who from your team will be dedicated to this project, and what is their time commitment (hours/week)? A project needs more than just a lead; it needs subject matter experts.

Existing System & Process Analysis

Provide insights on the current system's limitations and the "as-is" state of your workflows.

- ☐ **Document current workflows** – Map out the current process for tasks this project will impact (e.g., how is a B2B order currently placed, processed, and fulfilled?). Where are the manual steps and bottlenecks?
- ☐ **Access existing system performance data** – If replacing or upgrading, provide quantitative data on current limitations (e.g., average page load times, system downtime, number of steps to complete a task).
- ☐ **Gather user feedback** – What are the biggest complaints and feature requests from both internal and external users about the current system or process?

Content & Data Inventory

Ensure the accurate inventory and migration of all essential data.

- [ ] **Data for migration** – What existing data needs to move? (e.g., product data, customer/supplier records, transactional histories, sales orders).
- [ ] **Data source of truth** – For each data point (e.g., product info, pricing, inventory), which system is the definitive source? (This is often the ERP).
- [ ] **Data cleansing plan** – Does any of the existing data need to be cleaned, standardized, or archived before migration? Who is responsible for this?
- [ ] **Additional data needs** – What new data will you need to create or source? (e.g., rich product marketing content, detailed specifications, customer-specific pricing tiers).

System Integrations

Identify all critical systems required to create streamlined, automated workflows.

- [ ] **ERP and inventory management** – Specify the exact ERP system and version. What specific modules or connections are required?
- [ ] **PIM (product information management)** – Do you have a PIM? If so, which one?
- [ ] **Order processing and shipping** – What systems are used for order management and shipping automation?
- [ ] **CRM** – Do you use a CRM (e.g., Salesforce, HubSpot)? How should it interact with the new platform?
- [ ] **Payment & tax** – What payment gateways and tax calculation services are required?
- [ ] **Marketing automation** – Do you need integrations with platforms like Klaviyo, Marketo, etc.?
- [ ] **Other integrations** – List any other relevant systems (e.g., supplier databases, analytics platforms, dealer portals).

Project Functionality

Define the specific features and capabilities the new system must have.

- [ ] **Define core features ("must-haves")** – List the non-negotiable functionalities. (e.g., complex B2B pricing structures, quote requests, real-time inventory, quick order pads, order history & re-ordering).
- [ ] **Define secondary features ("nice-to-haves")** – List desired functionalities that could be part of a later phase. (e.g., advanced personalization, loyalty programs, enhanced analytics).
- [ ] **Reporting and analytics** – What specific data and reports need to be easily accessible? (e.g., sales reports by region, customer behavior insights, demand forecasting).

Technical, Security & Compliance Requirements

Ensure the platform is built on a solid foundation that is secure and compliant.

- ☐ **Compatible technologies & platforms** – List any specific systems or platforms the project must interact with.
- ☐ **API connections & documentation** – Identify necessary API integrations. Is documentation available for these APIs?
- ☐ **Regulatory requirements** – Clarify industry-specific compliance needs (e.g., PCI for payments, GDPR/CCPA for data privacy, HIPAA).
- ☐ **Security measures** – Define standards for data protection (e.g., encryption, secure login, user roles & permissions, SSO requirements).
- ☐ **Performance & scalability** – What are the expectations for transaction volume, concurrent users, and site performance (e.g., page load speed)?

Design, UX & Brand

Ensure the final product aligns with your brand identity and provides an intuitive user experience.

- ☐ **Collect relevant design assets** – Gather visual references or links to sites/apps you admire (and explain what you like about them).
- ☐ **Brand guidelines** – Provide complete logo and branding assets (logo files, color codes, typography preferences).
- ☐ **Digital resources** – Share existing collateral that reflects your brand's tone and message (e.g., product catalogs, user guides, marketing materials).

With these preparations in place, you'll be well-equipped to start your digital transformation project, whether it involves an ecommerce build, a customer portal, or a full system integration.

Unsure about your first steps?

If you have any questions or need guidance on any of the items listed, our team is here to help.

Contact us

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