DIY Digital Discovery

ACRO COMMERCE

1. Prioritize the Right Outcomes

- [ ] **Start with customer pain**
  What do they complain about most? (Slow quotes, unclear pricing, no stock visibility)
- [ ] **Find internal friction**
  Where are you losing time, trust, or revenue? (Manual quotes, over-discounting, late orders)
- [ ] **Spot the workarounds**
  What are teams hacking together? (Spreadsheets, manual emails)
- [ ] **Pick one key problem to solve first**
  Know what you're afraid to get wrong. (Adoption, integrations, scalability)

2. Align Your Decision-Makers

- [ ] **Secure an executive sponsor**
  They should have cross-functional influence and back the initiative publicly.
- [ ] **Assign a lead with real capacity**
  They need dedicated time and decision-making authority, not just their name on a slide.
- [ ] **Map out key stakeholders**
  Note who gives input, who approves, and who could block momentum.
- [ ] **Clarify how decisions get made**
  Define final decision-makers and escalation plans for deadlocks.

3. Define the Customer Experience

- [ ] **Map the current journey**
  Walk through the steps your customers take today. Even a quick whiteboard sketch can reveal friction and confusion.
- [ ] **Pinpoint real pain**
  Identify where customers get stuck, bail out, or rely on support to move forward.
- [ ] **Describe the ideal experience**
  Focus on what customers should be able to do easily. Not just which tools you'll use to get there.
- [ ] **Include internal users**
  Ask sales, service, and ops how the current process slows them down or creates extra work.

4. Validate Your Assumptions

- [ ] **Test before you build**
  Confirm the problem is worth solving, and see if an off-the-shelf tool already handles it well enough.
- [ ] **Take stock of your data**
  Look at what you actually track, where it lives, who owns it, and what key info might be missing.
- [ ] **List your connected systems**
  Include everything that may need to sync: ERP, CRM, PIM, quoting tools, shipping, etc.
- [ ] **Surface hidden blockers early**
  Watch for red flags like API limits, outdated systems, poor data hygiene, or lack of internal capacity.

5. Get Ready to Execute

- [ ] **Confirm time and internal capacity**
  Identify who's responsible and make sure they have the weekly bandwidth to own their part. This can't be a side project.
- [ ] **Align on budget & expectations**
  Is this a small-scale pilot or a full transformation? Get clear on your investment range and what success looks like at each level.
- [ ] **Clarify who's involved (and when) across each phase**
  Design, build, testing, launch... Outline who's involved and when, so there are no surprises later.
- [ ] **Prep your partner handoff**
  Great outcomes start with clear inputs. Equip external partners with goals, systems context, key blockers, and any "must-dos."
- [ ] **Reinforce your shared "why"**
  Everyone on the team should be able to clearly explain why this work matters now, and what you're aiming to improve.

Feeling stuck?

We're only a call, email, or LinkedIn DM away.
Even if you're midstream or not sure what step comes next.