

Get your digital presence up-to-par with this handy checklist. You can start with the basics and grow increasingly sophisticated. An **end-to-end customer experience platform** like Thryv can help you **streamline all aspects of your digital transformation.**



Website

- Logo, tagline, images, videos or graphics about your business.
- Up-to-date service and/or product descriptions.
- Up-to-date location, contact information, hours of operation.
- Blog or regularly updated content.
- Mobile-friendly design.
- Accessibility options for hearing/visually impaired site visitors.
- Calls-to-action to create engagement and sales.
- Complementary smartphone app.



Customer Relationship Management

- Client information: Name, address, phone, email address, products/services purchased, birthday, anniversary, etc.
- Digital customer database with segmentation capabilities.
- Leads management.
- Sales data and performance management.
- Client portal for direct online interaction.
- Client data enrichment search.
- Online document sharing and storage.



Payments

- Estimate template.
- Invoice template.
- Form builder.
- Payment processing service (to accept credit cards, ACH, etc.)
- Accounting software app.
- Installment plan or scheduled payments software.



Scheduling

- Online calendar.
- 24/7 online appointment scheduling.
- Online service bundling/package software.
- Automated reminders and follow-up.



Communication

- Two-way text messaging service.
- Online email account.
- Staff correspondence accounts.



Reputation Management

- Review request template and link.
- Review notifications.
- Review acknowledgment service.
- Competitor watch/benchmarking.



Marketing

- Email marketing system.
- Marketing automation capabilities.
- Marketing campaign templates.
- Triggered marketing campaigns.
- Campaign management and scheduling.
- Marketing KPIs, metrics and analytics.



Online Presence

- Up-to-date business information.
- Online listings on relevant sites: Yelp, Google My Business, etc.
- Centralized online listings provider.



Social Media

- Business pages on Facebook, Instagram, Twitter, LinkedIn, etc., with consistent logo and images.
- Posting content plan – text and images or video.
- Posting schedule.
- Content and post library.
- Social media posting dashboard.
- Social media advertising plan.