

**Go Digital Programme**

**Digital Audit**

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| **1** | **Business Information**  | **Notes**  |
| 1.1 | Name of business |  |
| 1.2 | Name and position of client |  |
| 1.3 | No of employees |  |
| 1.4 | Sector |  |
| 1.5 | No of years trading  |  |
| 1.6 | Business life cycle stage e.g. start- up, growth, expansion, mature |  |
| 1.7 | Consultant name  |  |
| 1.8 | Date of audit  |  |

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| **2** | **About the business**  | **Notes**  |
| 2.1 | General description of business activity  |  |
| 2.2 | Strategic aims of the business |  |
| 2.3 | Do they have a digital strategy or plan on how to optimise and embed digital tools within their business? |  |
| 2.4 | Reason for engaging with the programme, intentions, expectations  |  |

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| 3 | **Current state of play**  | **Notes** |
| 3.1 | What is the client’s current business priorities?  |  |
| 3.2 | What role does digital technology play in achieving these priorities?  |  |
| 3.3 | What are their main challenges/pain points?  |  |
| 3.4 | Which digital tools do they currently use  |  |
| 3.5 | How have these been effective/ineffective?  |  |
| 3.6 | Are there any digital tools that the client wishes to focus on? |  |
| 3.7 | Does the client think they (and their staff) have the necessary skills, experience and capabilities to adopt and embed digital tools within their organisation?  |  |

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| 4.0 | **Next steps**  | **Notes** |
| 4.1 | Does the client have any digital transformation projects in the pipeline?  |  |
| 4.2 | Is there any training they would like to receive?  |  |
| 4.3 | Discuss the potential digital tools/training that could be of benefit to the business and why  |  |
| 4.5 | Highlight the suppliers’ database to the client as a resource to find digital technology suppliers from Norfolk and Suffolk.  |  |
| 4.6 | Highlight the business voucher scheme to the client as a potential funding source for a digital transformation project  |  |
| 4.7 | Highlight the requirement to report on progress 6 weeks and 3 months after this meeting  |  |

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| **5.0** | **Other**  | **Notes** |
| 5.1 | Please note here a summary of any other relevant points made and discussed  |  |

I confirm that this is a true record of the meeting between the following parties, held on (insert date)

Consultant name and signature

Client name, business and signature

Digital tools include (but are not limited to):

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| Management software e.g. CRM (Customer relationship management) or management information system online | Data analytics such as Google Analytics |
| Data/file storage in the cloud (e.g. Dropbox, Google Drive, OneDrive, iCloud, etc.) | Mobile internet and technologies |
| E-commerce (buying from suppliers and/or selling online to customers) | E-commerce (buying from suppliers and/or selling online to customers) |
| Search engine optimisation  | Website |
| Billing customers using online software (e.g. Xero, Sage Cloud, Quickbooks, etc.)VOIP/Internet telephones | Virtual/online meetings |
| Online collaboration tools (e.g. Troll, Basecamp, Slack, etc.) nline collaboration tools (e.g. Troll, Basecamp, Slack, etc.) | Digital procurement (applying for tenders/work online) |
| Online learning schools/courses | Digital HR tools |
| Connection speeds  | Security and data protection measures eg. Firewalls, malware protection, backed up files, encrypted data  |
| There will also be tools specific to certain sectors for example booking platforms for the visitor economy.  |  |