

Digital self-assessment

Use this assessment as a tool to benchmark where your agency is today and identify opportunities for growth across five important categories. For each category, rate yourself with a score of 0 to 5, with 0 being none at all and 5 being perfect. Then total up your scores to determine the areas that digital acceleration is needed most. Save your score and revisit this assessment on a quarterly basis to track your progress.



WEBSITE

Modern & visually appealing 1 2 3 4 5

Mobile-friendly 1 2 3 4 5

SEO optimized 1 2 3 4 5

Blog 1 2 3 4 5

CUSTOMER COMMUNICATION

Text messaging 1 2 3 4 5

Live chat on your website 1 2 3 4 5

Carrier service center 1 2 3 4 5

Video proposals and reviews 1 2 3 4 5

DIGITAL OFFICE

Cloud-based AMS 1 2 3 4 5

VoIP 1 2 3 4 5

VPN 1 2 3 4 5

eSignature 1 2 3 4 5

DIGITAL MARKETING

Social media 1 2 3 4 5

Paid search 1 2 3 4 5

Online reviews 1 2 3 4 5

Monthly newsletter 1 2 3 4 5

KPI TRACKING

Email opens 1 2 3 4 5

Online reviews 1 2 3 4 5

Social media engagement 1 2 3 4 5

Paid search 1 2 3 4 5

TOTAL SCORE

Website _____
 Customer communication _____
 Digital office _____
 Digital Marketing _____
 KPI tracking _____

TOTAL: _____ /100