

DIGITAL ASSET INTEGRATION CHECKLIST_

Best Practices for Better Outcomes



Deep Dive Digital. Built for B2B.



Triad B2B Agency is happy to provide this *Digital Integration Checklist* for teams involved in M&A activities. Use this checklist in conjunction with our free whitepaper, *M&A Strategies: Digital Asset Integration*.

BRANDING

Items to Consider

- Branding Audit
- Key Messaging Audit
- Brand Standards Audit
- Revised Product/Service Architecture

MARKETING ASSETS

Items to Include

- Company Logos
- Product Logos
- Facility Photography
- Product Photography
- Campaign Photography
- Corporate Videos
- Product Videos
- Content Resources
(Whitepapers, Product Literature, Case Studies, Etc.)
- Brand Standards
- Internal Marketing Contacts

Items to Finalize

- Digital Marketing Assets Portal

COMPANY WEBSITES

Items to Review

- Site Audits
- Navigation
- Messaging
- Content
- Resources
- Information Architecture
- Calls-to-Action
- Contact Form Recipients
- Special Features (Live chat, maps, etc.)
- SEO Reports
- Conversion Rates

Items to Document

- Domain Registrar Information
- Domain Registrar Access Privileges
(User Name and Password)
- Domain Renewal Dates
- Domain Usage/Purpose
- Web Host Information
- Web Host Access Privileges
(User Name and Password)
- Backend/Content Management System Information
- Backend/CMS Access Privileges
(User Name and Password)
- CPanel Information
- CPanel Access Privileges
(User Name and Password)

SOCIAL MEDIA ACCOUNTS

Items to Review during Social Media Audit

- Company Profiles/Pages – All Channels
- Followers
- Content
- Scheduling
- Engagement
- Tone, Look & Feel of Posts/Profiles

Items to Document

- Social Media Platform Inventory
- Access Privileges
(User ID and Passwords)
- Authorized Users/Administrators

DIGITAL ADVERTISING PROGRAMS

Items to Review

- Existing Ad Campaigns
- Past Ad Campaigns
- Budget
- Targeting
- Geographic Areas
- Messaging
- Scheduling
- Click-throughs
- Conversions

Items to Document

- Administrative Access Privileges
(Google Ads, LinkedIn Content Manager, etc.)

EMAIL PLATFORMS

Items to Create

- Email Signature Templates
- Email address format/conventions
- Email Distribution Lists/Databases
- Employee Email Merger Communications Plan

Items to Document

- Enterprise Administrative Access Privileges

MARKETING SYSTEMS

Items to Review for Consolidation

- Integration, Migration
- Marketing Automation Systems
- CRM Systems
- Lead-generation Programs
- Email Distribution Systems
(Constant Contact, Campaign Monitor, etc.)

Items to Document

- Access Privileges (User ID and Passwords)
- Authorized Users
- IT Support Sheet
- Training Support Sheet

OTHER

- Manage VoIP/Phone Number Changes Across Digital Marketing Channels
- Manage VPN Access Protocols Across Digital Marketing Channels
- Conduct Software Audit

DOMAIN NAME SYSTEM (DNS) PROVIDERS**Items to Review for Consolidation, Integration, Migration**

- Reputation
- Services
- DDos Protection
- DNSSEC Extensions

Items to Document

- DNS Providers Spreadsheet

DOMAIN REGISTRANT REPORTING**Items to Report**

- Administrative Contact Changes
- Address Changes
- Email Changes
- Telephone Number Changes

DIGITAL CERTIFICATES**Items to Review for Consolidation, Integration, Migration**

- SSL/TLS Certificates
- CAA Records

Items to Document

- Digital Certificates Spreadsheet

SECURITY**Items to Review Across the Digital Enterprise**

- Two-factor Authentication
- Registry Lock
- SSL/TLS Certificates
- CAA Records
- DDos Protection
- DNSSEC Extensions

REPUTATIONAL CONTENT**Items to Review**

- Associations
- Directories
- Third-party Links
- Research
- Reputational Domain Inventory Spreadsheet
- Remediation Action List
- Items to Document
- Reputational Database (including URLs)

VENDORS**Items to Review across the Digital Enterprise**

- Vendor Evaluations
- Vendor Capabilities
- Vendor Consolidation

Items to Document

- Vendor Database

SUBSCRIPTIONS AND SERVICES**Items to Review**

- Analytics Tools
- Stock Photography Subscriptions
- List Services
- Other

Items to Document

- Access Privileges
- Subscriptions and Services Spreadsheet

OTHER IT CONSIDERATIONS

- Access Privileges & Licenses
- Wireless Access Points
- Switches
- Firewalls
- Antivirus Software
- Amazon Web Services
- Microsoft Azure
- Office 365
- Other

FUTURE PLANNING**Items to Develop**

- Website Development Plan
 - Website Management Plan
 - Monthly Search Engine Optimization
 - Digital Advertising Plan
 - Social Media Plan
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