DIGITAL ASSET INTEGRATION CHECKLIST_

Best Practices for Better Outcomes

T R I A D
T3D™

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/TLC 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

TRIAD

B2B AGENCY

GET IN TOUCH

Triad B2B Agency™
10670 N. Central Expressway
Suite 465
Dallas, TX 75231

CONTACT

Tom Prikryl
President
(214) 953-6223
tp@triadb2bagency.com

EMAIL US

info@triadb2bagency.com

WEB

triadb2bagency.com