



MARTECH CHECKLIST

For membership organisations

This checklist will help you prepare for and start the conversation with specialist digital transformation partners.

You need: better integration

- Have you clearly mapped out your primary member journeys?
- Have you created a MoSCoW matrix of functional requirements to deliver exceptional digital experiences aligned to these member journeys?
- Have you audited your current tools and systems, including why, where, and how they are used?

You need: to connect multiple databases

- Have you appointed a stakeholder responsible for 'data'?
- Have you documented what data you have, where it's stored, how long it's stored for, and why you need it?
- Have you identified a 'single source of truth' for your membership data?

You need: an improved digital experience

- Does your current web platform support content personalisation?
- Have you identified 'what' and 'why' you want to personalise?
- Have you created your member personas?

You need: to fix existing systems

- Are you on the latest versions of the software you use?
- What integrations exist with your current systems?
- Have you identified where the flow of data is interrupted?