**How to prepare a strategy for digital transformation**

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# Where do I start?

Although most companies understand the importance of digital transformation, many are overwhelmed by the idea of having to revamp their entire approach without knowing how to implement a transformation.

But they also realise that if they don’t do anything, they run the risk of being disrupted and replaced.

The only way for our businesses to thrive during and after this crisis it to **adapt into the new normal** along with its different market demands **quickly and effectively.**

When done right, digital transformation allows companies to provide **unprecedented value to customers**.

Trying to write a digital strategy for the first time can be very intimidating as most people think that they need to take a very technical approach but the truth is that **the first steps to form a good strategy are not technical** at all. What they require is a good analysis of the current business along with a vision for the future.

We all start by asking ourselves and our colleagues a lot of questions. For example:

* What shape can digital transformation take in our business?
* How do we prepare ourselves to make the transformation?
* How much time is it going to take?
* How much is it going to cost?
* Who in the company will be responsible for it?
* Which parts are we going to tackle first?

In our experience, the best way to approach this complicated task is to break it down into 3 steps.

1. Analysis
2. Goal definition
3. Priorities

# Step 1: Analyse your current business processes

Before you can get answers to all those questions, you will need to do an analysis of your current work processes. Start by filling in the following table as per the first example.

* Try to be as granular as you can as demonstrated in the example below.
* Make sure you write down every single internal and external processes in the company.
* The more details you put in, the more comprehensive and robust strategy you’ll be able to build later on.
* Be very honest about the information you put in.
* Try to engage other people in the company with this process.
* Staff experience: ask your staff how efficient is the process? How easy it is to complete. Do they think it can be improved? Ask them to rate it.
* Client experience: ask a few clients to rate the process or have one of your staff or colleagues go through the process as a client and rate it. How easy it is to follow. How likely are they to come back and do it again? Are they happy with the clarity of information and did they get sufficient confirmation info, so that they understand where it stands?

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| Current business processes | | | | | | |
| Activity/Process | **Current process** | **Current time it takes** | **Involved in the process** | **Staff experience**  **(1-10)** | **Client experience**  **(1-10)** |
| *Sell* service no 1. | 1. Client reads about the service on our website. 2. Client sends an enquiry form. 3. John from Sales gets the email. 4. John passes to Gill from Operations who checks availability internally. 5. John emails a quote to the client. 6. Client accepts quote. 7. John converts the quote into an order and passes on the Jane from accounts. 8. Jane sends an invoice to the client. 9. Client pays by Bacs. 10. Jane confirms payment & passes back to Gill. 11. Gill gets in touch with the client and sets up a date for the service to be supplied. 12. Client is supplied with the service. 13. John sends the client a feedback form. | 4-6 hours | * John from Sales * Gill from operations * Jane from accounts | 5 | 6 |
| Generate monthly sales report |  |  |  |  |  |
| Generate leads |  |  |  |  |  |
| Allow clients to book training |  |  |  |  |  |
| Sell membership |  |  |  |  |  |
|  |  |  |  |  |  |

# Step 2: Define goals & objectives

After doing the initial analysis on current business processes and their efficiency, we should be able to deduct which processes we want to keep as they are, which ones we want to keep but transform them into a more digital and automated process, which processes are no longer relevant and what is the priority of changing the current process?

This step can also define new ideas for processes that are not in existence currently.

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| Goals & objectives for our current and future processes | | | | | | |
| Activity/Process | **Is this an existing process?** | **Is it still required?** | **Can this process be improved if digitised?** | **Responsible for this task** | **Involved with this task** | **Priority** |
| *Sell* service no 1. | Yes | Yes | Yes | Gill, operations manager | * John from Sales * Gill from operations * Jane from accounts | High |
| Generate monthly sales report |  |  |  |  |  |  |
| Generate leads |  |  |  |  |  |  |
| Allow clients to book training |  |  |  |  |  |  |
| Sell membership |  |  |  |  |  |  |
| New idea… |  |  |  |  |  |  |

# Step 3: Prioritise your transformation tasks

Digital strategy is the plan that we put in place in order to achieve our digital transformation objectives. **List only the activities that should be digitised.**

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| Transformation tasks priorities | | | | | | |
| Activity/Process | **New digital functionality required on client side** | **New digital functionality required on company side** | **Responsible for transformation** | **Time estimate** | **Cost estimate** | **Priority** |
| *Sell* service no 1. | * Add ordering system * Add online payment * Allow auto invoicing * Automated emails * Enhance website to allow client login to see their order status. | * Assign tasks for staff when new order comes in * Add booking to calendar * Send confirmation email * Send auto reminder email | Gill, operations manager | 2 – 3 months | Get quotes | High |
| Generate monthly sales report |  |  |  |  |  |  |
| Generate leads |  |  |  |  |  |  |
| Allow clients to book training |  |  |  |  |  |  |
| Sell membership |  |  |  |  |  |  |
| New idea… |  |  |  |  |  |  |

This is a very simple example of creating a roadmap for your digital strategy, this table could be enhanced to include current profit and loss figures, ROI figures etc. You can use it as a very basic starting point and enhance it with your team to your requirements.

When the time is right and you decide to go ahead with one or more stages of your digital transformation journey, the above 3 steps approach will hopefully give you a good head start for a conversation with your IT supplier, Software developers, Web developers, Marketing agencies etc.

Doing the ground work yourself will save a lot of time, effort and money and will gain more focus and clarity.

Good luck!

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Please don’t hesitate to contact me if you need some clarifications:

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