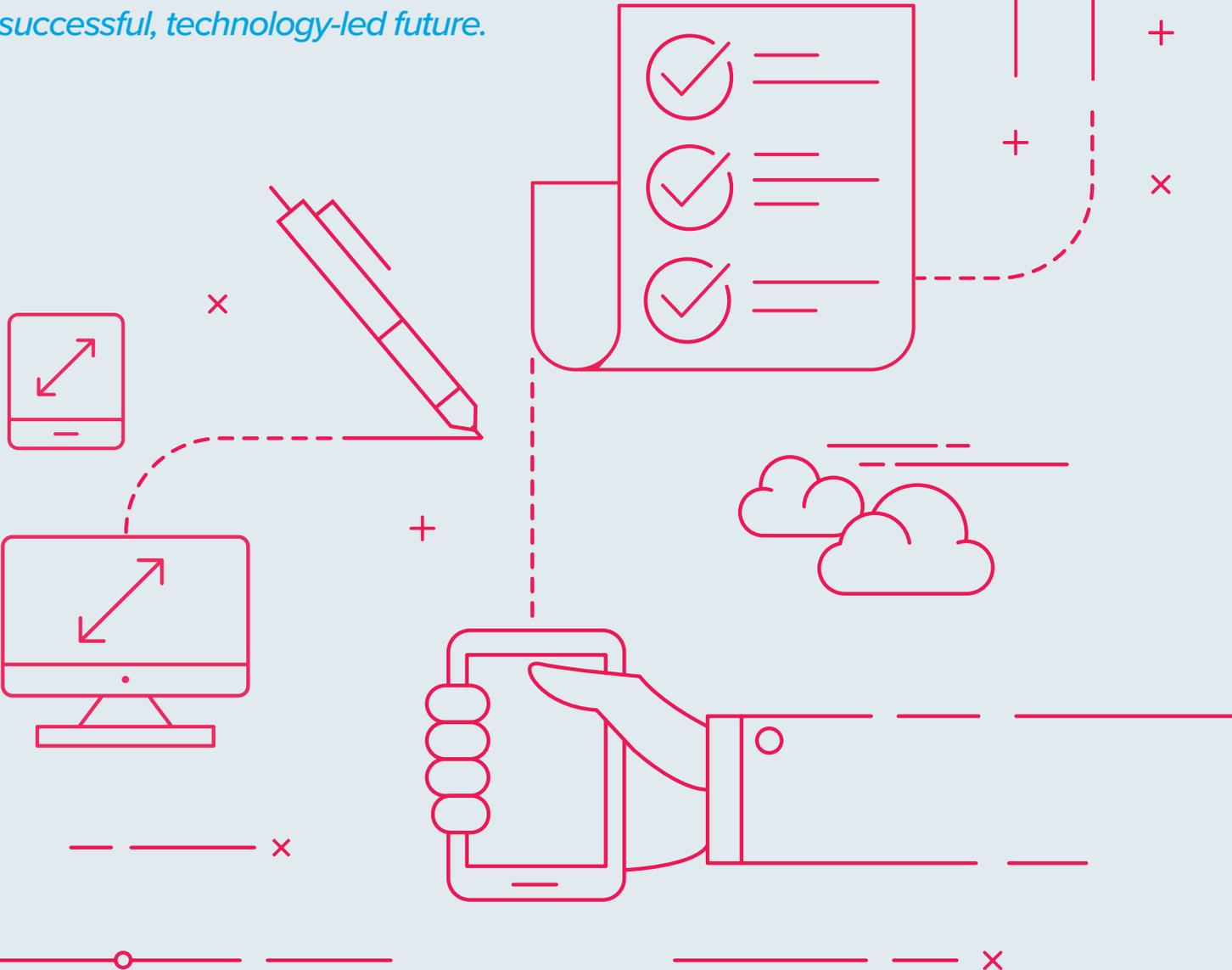


## The Ultimate Digital Transformation Checklist

Get practical insight into progressing your digital transformation strategy towards a successful, technology-led future.



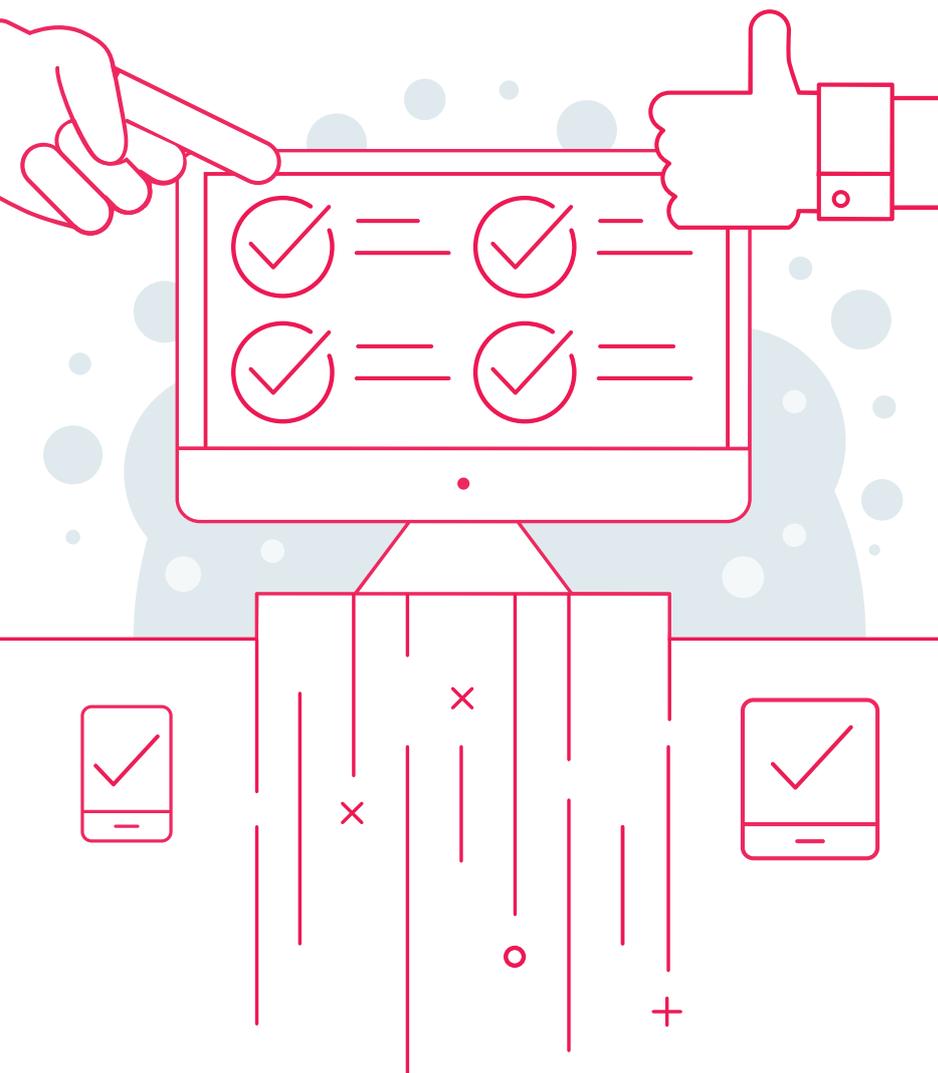
# The Ultimate Digital Transformation Checklist

In order to compel change within your business, you need to make the transition away from rigid legacy systems towards adaptable IT environments.

By adopting new and innovative technologies you can drive productivity for your employees and your business operations, all while making targeted decisions to accelerate growth based on data and analytics as part of your digital transformation strategy.

**So, what are some of the key targets your business should aim to hit when undergoing digital transformation?**

This checklist offers a guide to some of the strategies your business and IT team should take into account to deliver a successful transition, and looks to highlight the urgent actions for your decision makers that can be deal breakers in the road to digital transformation.



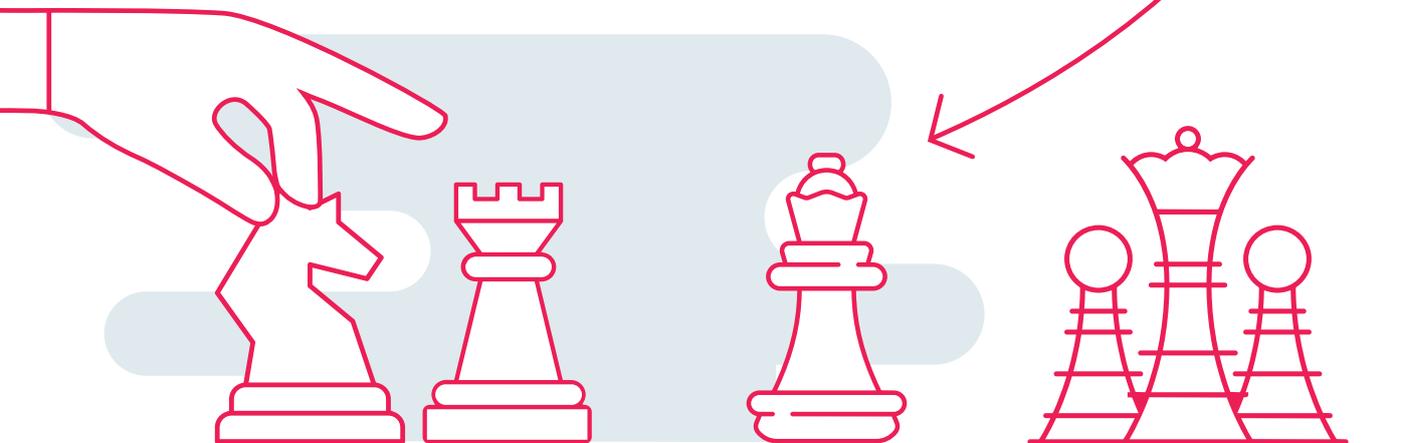
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## Define a clear strategy

There is no one size fits all path to digital transformation due to the fact it can be disruptive, despite efforts to minimise disruption, and can potentially be difficult for those businesses who are reliant on legacy systems.

Whatever the challenges, defining a clear strategy is one of the important aspects that will allow you to decide early on whether this will be a successful transition. Whether it is internally, or with the guidance of a trusted partner, mapping out a strategy will provide you and the wider business with foresight for the future - helping to visualise your strategy - and identify any initial problems that may arise with the project.



**Map out the objectives you want to achieve with this project.** Take note of the important actions that will be needed to drive those changes, and clearly communicate with your team what the roadmap to success will look like. Digital transformation will not only implement a shift in your technology but your company culture too. Communicating your strategy effectively from the beginning of the project will make it easier for your company culture to embrace change.



**Build business decision support that is cross-functional across your organisation.** Through this, you can maintain an understanding of the strategy and priorities across all departments, not just IT, and gain support towards the goal.



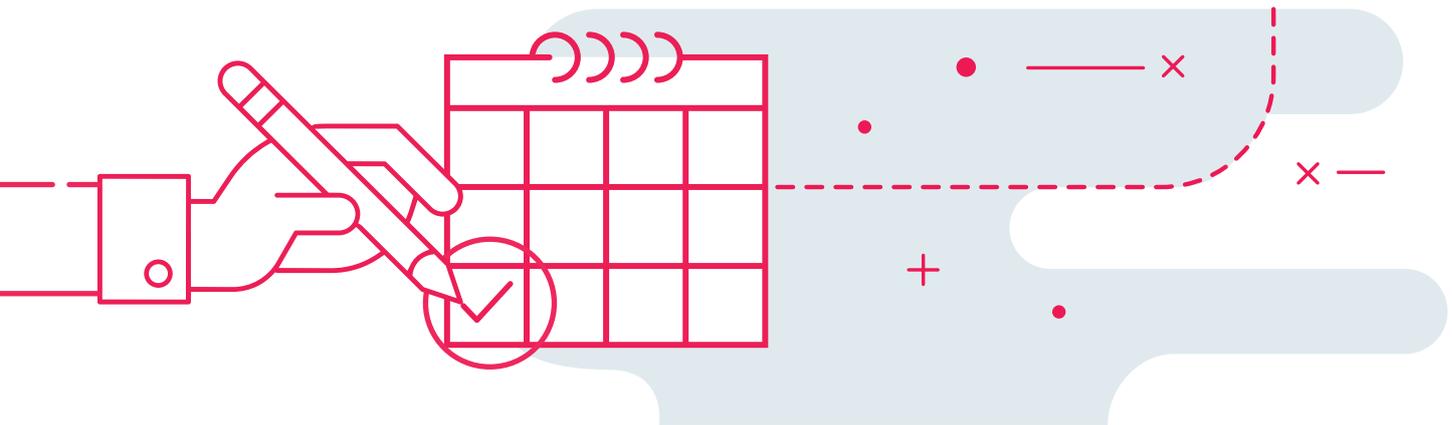
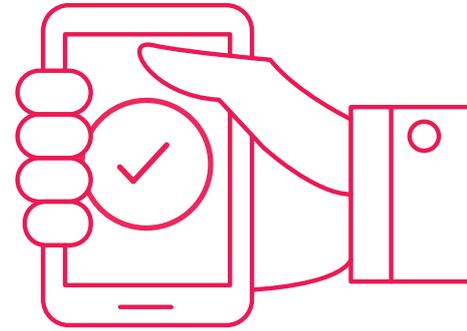
**Get the ball in motion for moving towards a flexible IT environment.** This will enable your organisation to accelerate change. Decide which aspects of your IT environment will be transitioned first, and make sure to map out any future IT transitions your business will want to make. Take a look at the technology you are currently using and consider the total cost of ownership and return on investment that would occur if you transitioned to different technology solutions. It's worth identifying low hanging fruit that will have little to no disruption on the business but can potentially offer you key learnings for future migrations. By considering TCO and ROI, you can identify technology to change that is not too mission critical, but not too small.

## Digitalise your process workflow

There is no doubt that manual, paper-based processes can hold a business back from achieving the same efficiencies as competitors.

In fact, manual processes take up valuable business time, increase the response time to internal and external customers, and reduce the security of important business information. Digitalising your process workflow by automating routine and manual tasks using technology will drive higher levels of productivity and efficiency within your business while making it easier for employees and allowing them to take on more important tasks.

Additionally, document and record management can be digitalised and workflows can be streamlined by utilising different software and platforms. Digitalising business processes can lead to greater efficiency and higher security. Every process should be up for review and be debated on the merits of automation. Why should your business use manual processes to complete important business processes when digitisation provides greater levels of efficiency and scalability?



**Begin by utilising automation software and technology in order to streamline your manual processes.** This will enable productivity gains for your people and streamlined document management which will allow for faster responses. Additionally, important business processes will feel the benefit of greater security, and less room for human error.



**Deploy the right tools and build the right processes that will allow your business to support your goals for future growth.** After defining a clear strategy, these aspects may be easier to identify. When you set foundations for future growth, your business can be more receptive to future-thinking business initiatives.

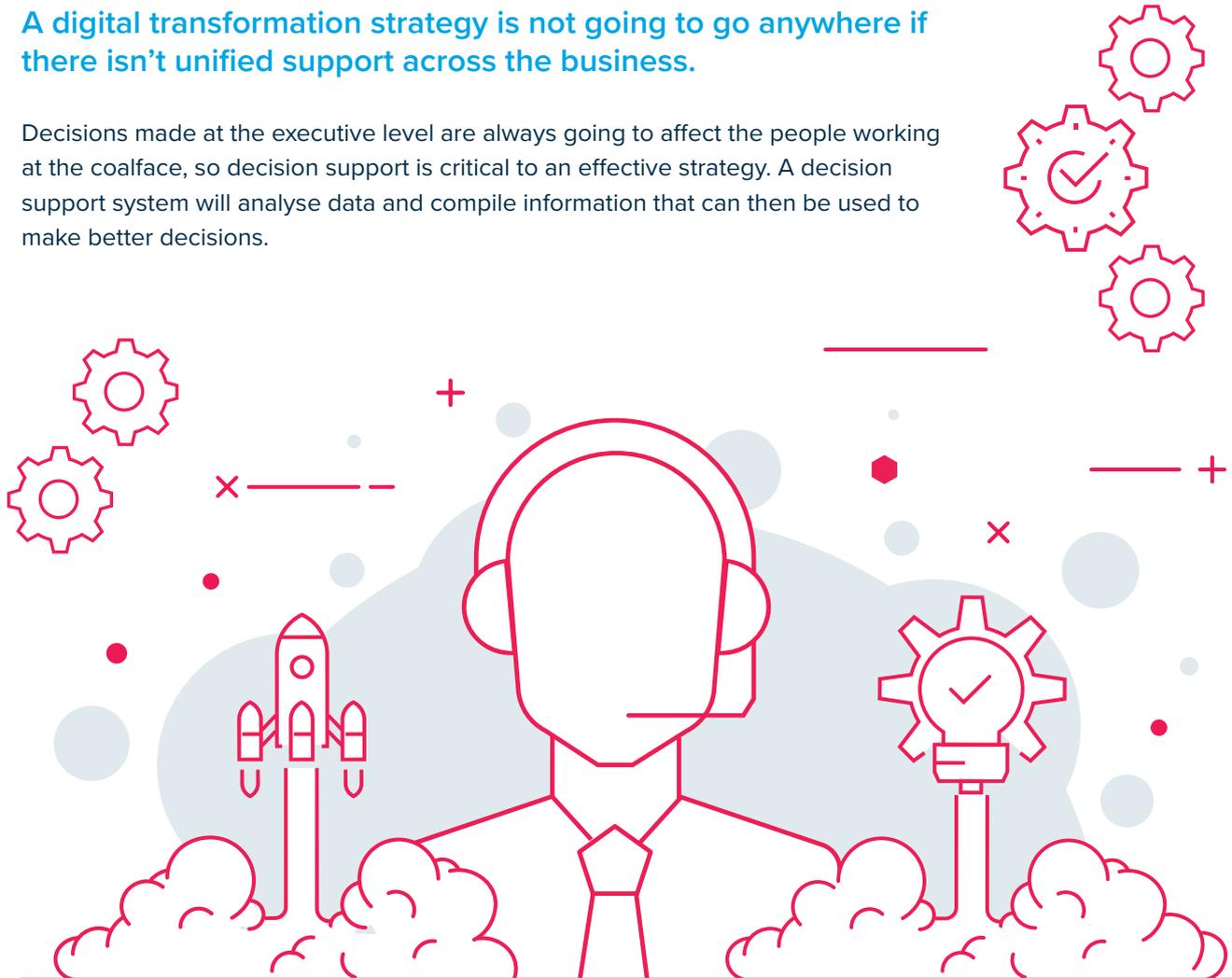


**Create a workflow for your existing data so that it does not go to waste.** This could either be a new process, or you could refine the ways you collect data from your existing workflow. Big Data is important within any industry, and it provides valuable insights into customers, products, and the tools your business could be using to hit your conversion rates. Create a workflow that efficiently makes sense of this data, so that you can utilise it to improve your business performance.

## Use business decision support

A digital transformation strategy is not going to go anywhere if there isn't unified support across the business.

Decisions made at the executive level are always going to affect the people working at the coalface, so decision support is critical to an effective strategy. A decision support system will analyse data and compile information that can then be used to make better decisions.



**Take into account the problems identified by your decision support system and key subject experts, and most importantly your customers.** Through this, you will begin to reduce the risk of error and eliminate processes that don't add value or are no longer required.



**Provide educational seminars or short teaching sessions for new technology in order to build confidence amongst your staff.** It can be useful to create a dedicated person in your company for staff to go to in case any problems with new processes arise.

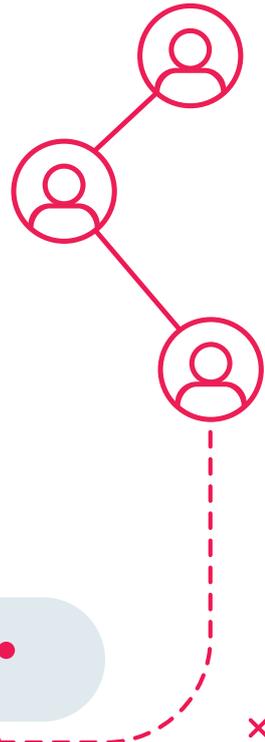


**Make sure to utilise the data you collate from your decision support system to make smart decisions when making the rest of your digital transformation choices.** Get guidance about solutions that can help you collect and make sense of the wealth of data outcomes from your business and make informed choices in the future. Always remember to revisit your data points as they are ever-evolving and changing.

## IT leaders can't do it alone

### Digital transformation facilitates business objectives, not the other way around.

Most mid-market companies don't choose to adopt technology just because you as the IT leader advocated it. In fact, they are more likely to adopt if the change in IT is positively impacting more than one business unit or positively impacting business objectives. The road to digital transformation won't be a success if the process doesn't go through all the decision gates within the business. From HR, finance, line of business, and security- all departments need to be working alongside IT and the executive board to make the joint decision of digital transformation. It is important to recognise that your employees will always be the driving force of your culture, so acceptance across all departments, not just IT, will implement the cultural changes required for a successful digital transformation.



**In order to have a successful transition, digital transformation needs to facilitate business objectives, not form them.** If the transformative outcomes of digitalisation are positively impacting the business objectives of each individual department in your business, then the initiative is more likely to be embraced by the wider business.



**IT leaders should communicate with their business what they are planning, learn from staff members, and look for potential disruptions in the plan.**



**Compare your position as a business to that of your competitors.** Take a look at how quickly they began their transition, and learn from their mistakes if you can. Make sure to listen to staff members and those who will use the technology that you are implementing. If you can learn from the journeys of your competitors, or get guidance from an experienced provider, it is best to grab every bit of knowledge you can. A top tip is to involve your business in industry roundtables and events. You will discover what strategies are being used by your competitors, remain up to date with trending industry strategies, and develop important industry connections.

## Embrace the cultural shift

Your business needs to understand that a digital transformation isn't just a technical shift, but a cultural one too. The human element of accepting and sustaining long-lasting change, learning new technology, and embracing a forward-thinking mindset is essential for a successful strategy.



**All employees of your business, from C-suite level to front-line employees, should be working with a mindset for embracing change.** Collaboration and cooperation should be a priority and driving-point for transformation.



**Employees from all levels should be making time to collaborate across departments or skill-set silos, to transparently discuss their experiences with technology and provide insights into their user experiences.** It is through this process your business can identify additional ways to improve and break down silos.



**The process of digital transformation should enable your business to move faster and with greater efficiencies.** The technology and solutions you adopt should allow your business to get to market quicker, and see the back of red-tape processes. This will allow your business to no longer take years to implement new or updated solutions, but rather remain agile and responsive to fast-paced digital transformation initiatives.



**Digitally transformed companies who are forward-thinking make sure their financial model is more focused on Op-ex spending rather than Cap-ex spending.** When you focus on Op-ex spending, your business can benefit from enhanced flexibility and agility. Cap-ex models of spending result in lengthy IT contracts, rigid infrastructure, and lack of transformative solutions.

# Translate your technology data points into KPIs

Companies produce a lot of data, and data can be analysed to offer decision points for businesses to develop KPI's and learn from themselves how to create more opportunities for success.

If a business utilises technology that can convert this data into tangible analytics, they can make smarter decisions, understand their target customers easier, identify unproductive patterns or processes, and streamline their efficiency by reflecting on their data.



**Unify your lines of business (LOB) with your preferred business outcomes and KPI's.**

Your LOBs should have drivers that incentivise digital transformation. I.e. Different lines have their own incentives, such as growing revenue. When you unify your LOB with your KPI's for digital transformation, you can plan a strategy that aligns with increased efficiency, productivity, and growth.



**Create a data-driven system, and continually examine which incremental alterations will yield higher-quality results.** Make sure to get guidance either internally or externally with a trusted advisor, partner or provider about the best ways to create and sustain a data-driven system.

## Pipeline your data

Data has a value greater than it ever has done in the past.

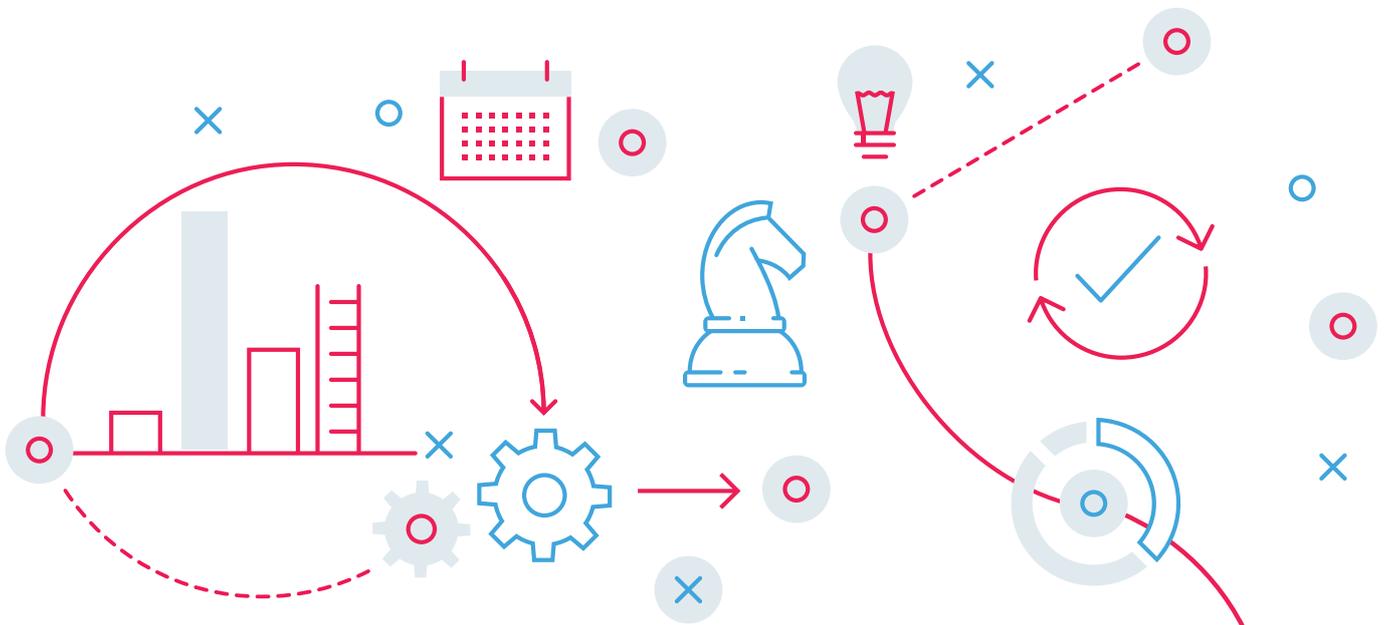
Pipelining this data into a warehouse where businesses can run analytics engines over the top, offers a great opportunity to stabilise the foundations of business decisions. The technology and skills required to extract the right decision metrics and points from such Big-Data initiatives are one of the biggest challenges to Digital Transformation, as such, outsourcing the solution with a trusted partner will provide the expertise and managed services.



**Choose a managed services provider who can set up alert and monitoring systems to make sure your business has visibility of issues if they occur, as your data is valuable.**



**Identify which solutions will help your business achieve your KPI's faster and more efficiently, and don't waste time investing in needless solutions.** Use the strategic plan that you clearly defined at the beginning of the project to decide which solutions you should channel your data in to.



**A key factor to take away from the digital transformation process is the importance of strategy.**

This checklist is designed to provide a visible framework that allows businesses to prioritize tasks, identify mistakes or improvements to be made, and assess where they currently stand in their digital transformation transition.

Additionally, it is important to understand the importance of implementing a cultural shift in your organisation and ensuring that your employees are forward-thinking and ready to embrace change. Your business should use this checklist-model to compare their transition to their competitors or use the checklist to assess their current business practices.

Businesses should understand that digital transformation is not achieved overnight, but rather a gradual maturing process that should be developed based on a solid methodology, and the KPI's of the company. This is best achieved with the guidance and advisory of a trusted partner, who can alleviate the burden of transformation from internal IT teams while offering a level of experience that can really boost the transformation of a business.

*Insights from Arkan Khedair, Head of Pre-Sales at Timico*





**The Ultimate Digital  
Transformation Checklist**

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