



Consulting Services

As a digital transformation consultant, my work follows a cadence of research, planning, execution, and communication to find, procure and implement the best technologies for your organization.



Research and Assess

We'll map your customer journey and identify technology opportunities to improve it.



Develop the Plan

We'll design a plan to reduce friction at customer touchpoints, starting with the most impactful software changes.



Execute the Plan

We'll work together to refine your customer journey by procuring and implementing new technologies through a conscientious change management approach.



Communications

With digital transformation, communication is essential.

- Digital business plans
- Internal & external communications
- Training



Digital Adoption Plans

I'm proud to be registered as an official digital advisor for the Canada Digital Adoption Program (CDAP).





Research and Assess



How effective is your customer journey?

Peter Drucker, the famous management consultant, author and educator, believed that **a business's sole purpose is to create a customer**. In that pursuit, it has two main functions: marketing and innovation. Marketing represents your customer interactions, while innovation is how you modify your products and services based on your customers' needs. To map your customer journey, I'll assess your marketing, customer success and service. For innovation, I'll focus on how you share your customer feedback internally, enhancing your ability to enable customer-centric innovation.





Visualizing your customer journey map

The outcome of the Research and Assess phase is a customer journey map representing how your organization interacts with customers across business functions. It also identifies whether customer feedback loops reach the decision-makers offering them intimate access to customer needs.



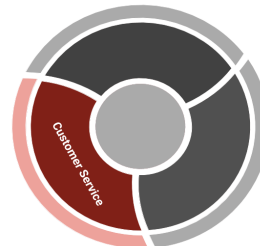
Marketing

We'll start with a marketing technology assessment and measure how it helps gain a competitive advantage



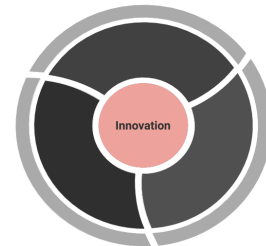
Customer Success

We'll look at how you're onboarding new customers and which products and services are first purchases. And how effectively you transition new customers onto their next purchase.



Customer Service

We'll focus on your critical accounts through interviews, surveys and audits. Then we'll look inwards through candid discussions with your teams.



Innovation

We'll audit your processes and technologies to learn how effectively you manage your client needs and share customer feedback.

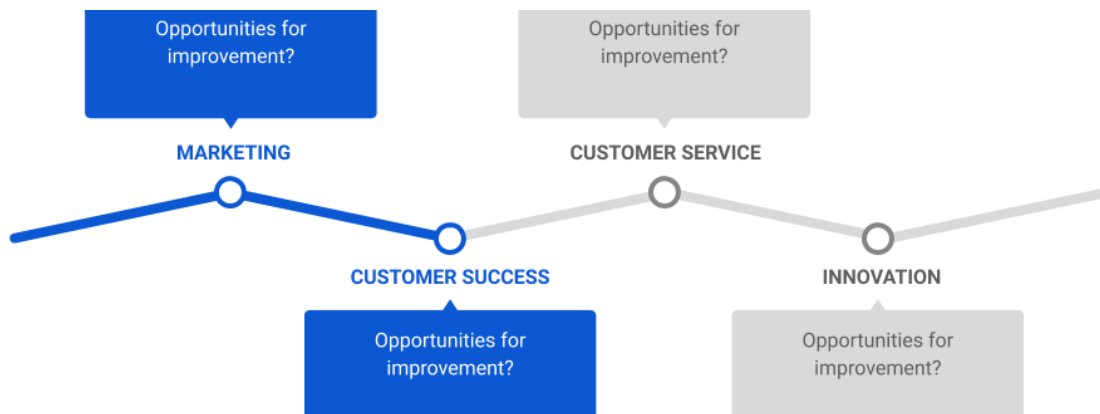




Develop the Plan

How can technology improve your customer journey?

We'll develop a plan to prioritize opportunities that gain the most impact. We're seeking cost-effective improvements to earn substantial customer trust, loyalty and revenue.



Prioritizing your opportunities.

To narrow our choices, we'll prioritize using the RICE technique. RICE is an acronym for Reach (how many customers will this opportunity benefit?); Impact (how much will your customers benefit from this opportunity?); Confidence (how confident are you in the Reach and Impact?); Effort (how much effort to make this opportunity happen?).

$$\frac{\text{Reach} + \text{Impact} + \text{Confidence}}{\text{Effort}} = \text{RICE SCORE}$$

Our plan will use an agile process.

After prioritizing your opportunities, we'll design a plan to tackle the top three, leaving the remaining on the list. Using an agile process keeps us centred on what's most critical, allows us to measure the iterative impact of our improvements, and encourages us to continue evaluating and prioritizing these opportunities against unforeseen market changes.





Execute the Plan

I'll procure and implement technology to refine your customer journey.

We'll select technology based on your prioritized requirements and use phased iterations to implement it. Some changes may be isolated to a single team, while others may impact your entire organization. Regardless, we'll implement change with a planned approach.

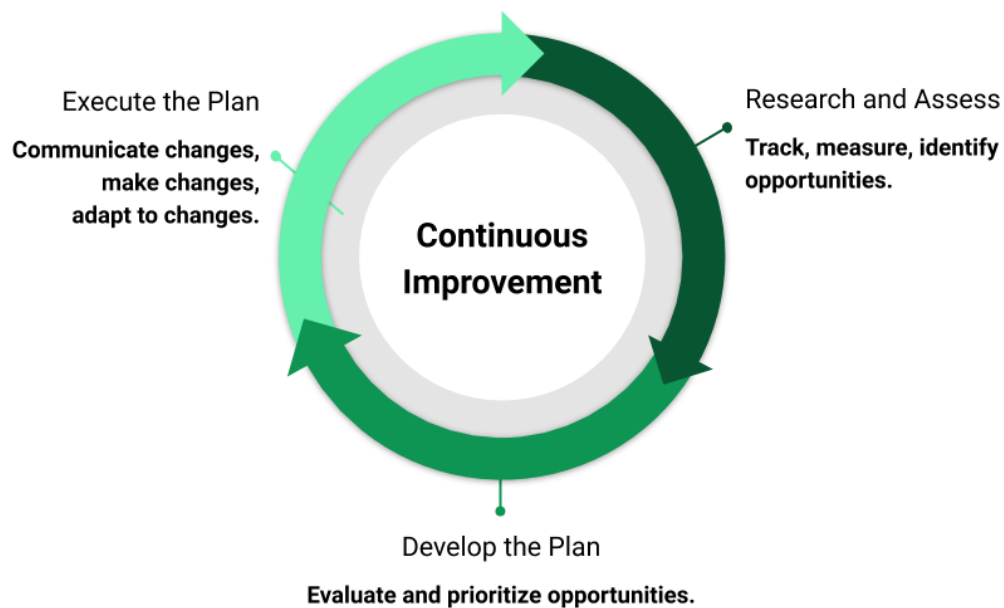
Technology implementation phases.



First, we communicate the desired state and plan to the impacted teams. Effective communication helps staff understand why change is necessary, how it will assist customers, and, most importantly, how it will affect them. Second, we'll test the changes with a select team before rolling them out across the organization. Third, we'll provide adequate training to allow teams to adapt to the new technology. Finally, we'll create a feedback loop to measure how well changes are being adapted and identify concerns before they escalate.



Continuous improvement.



Refining your customer journey is an ongoing process of continuous improvement. We'll iterate through these phases as you elevate your customer experience beyond competitors, helping establish a dominant market position for your business.



Communications

We'll design communications to capitalize on your digital transformation.

With digital transformation, communication is essential to success.

Digital Business Plans

I develop digital business plans to help organizations justify an operational investment or request funding, including communications such as the following.

- Determine and rationalize budgets and timelines;
- Identify, describe and mitigate risks against the potential rewards of change (cost-benefit analysis, weighted comparisons, SWOT analysis and quadrants);
- Surveys, interviews and focus groups to understand and define the current state;
- Requirements gathering documents to plan a future ideal state.
- Procurement recommendations that identify and rank optimal technology alternatives.

Internal Communications

When digital transformation happens, it's necessary to justify investing in or divesting from software and to help staff adjust to new processes and protocols.

- Communications to rationalize disruption and motivate change.
- Training to help staff transition.

External Communications

External communications help reposition organizations when digital transformation leads to new or improved business models and value propositions.

- Marketing, advertising and press releases;
- Website content (landing pages, blog posts, case studies);
- New sales material.





Digital Adoption Plans

The Digital Adoption Plan

As an officially registered digital advisor for the **Canada Digital Adoption Program (CDAP)**, I help businesses develop a Digital Adoption Plan for **Stream 2, Boost Your Business Technology**. The Digital Adoption Plan consists of four elements.

1. **Executive Summary:** a summary of the primary elements of the Digital Adoption Plan and how, if adopted, it will help achieve the desired outcomes to boost the business
2. **Current State Analysis:** relevant business information, such as the current business SWOT (strengths, weaknesses, opportunities, threats), external issues (market, competition, business model), and existing technology
3. **Digital Adoption Analysis and Recommendations:** new potential digital technology solutions to consider, including how each will benefit the business and meet the desired outcomes
4. **Implementation Roadmap:** the essential elements to implement the recommended options, including timeline, dependencies, costs to acquire the technology, etc.



The Canada Digital Adoption Program

The Canada Digital Adoption Program (CDAP) can help get your business online, boost your eCommerce presence, and help digitalize your business operations. CDAP provides funding and support to companies and training and work opportunities for young Canadians. The program offers two grant options.

Stream 1: The Grow Your Business Online grant helps small businesses take advantage of eCommerce opportunities by providing:

- Access to a network of eCommerce advisors and support
- Up to \$2,400 to buy new eCommerce tools

Stream 2: The Boost Your Business Technology grant helps small and medium-sized businesses adopt new digital technologies by providing the following.



- A free digital assessment tool to evaluate your digital readiness
- Up to \$15,000 to consult a digital advisor (like myself) and develop a digital adoption plan
- Up to \$100,000 in interest-free loans from the BDC to help implement the digital adoption plan
- Funded work placements for students or recent graduates who can help with digital transformations



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