Business Improvement Review - Agenda

Time: 45 - 60 minutes

Participants:

- Digital Advisor
- Executive

Objectives:

- Understand the Digital Adoption Plan Opportunity
- Set the baseline Business Improvement Scores
- Understand the Digital Adoption Plan Process
- Decide on next steps

Agenda:

- Introduction
- Digital Adoption Plan Opportunity Review
- Measurable Business Improvement Process Overview
- Business Improvement Quick Score
  - Business Capability Discovery - can we develop business capabilities to reach our goals?
  - Digital Maturity Discovery - can we effectively leverage digital technologies to support business capabilities?
  - Technology Readiness Discovery - can we effectively support the business with the right technologies?
- Digital Adoption Plan Process
  - 1: Digital Assessment
  - 2: Digital Solution Plan
  - 3: Digital Strategy Plan
- Proposal with the Grants
- Wrap Up
  - Feedback on the session
  - Summarize the action items

Digital Transformation Explained
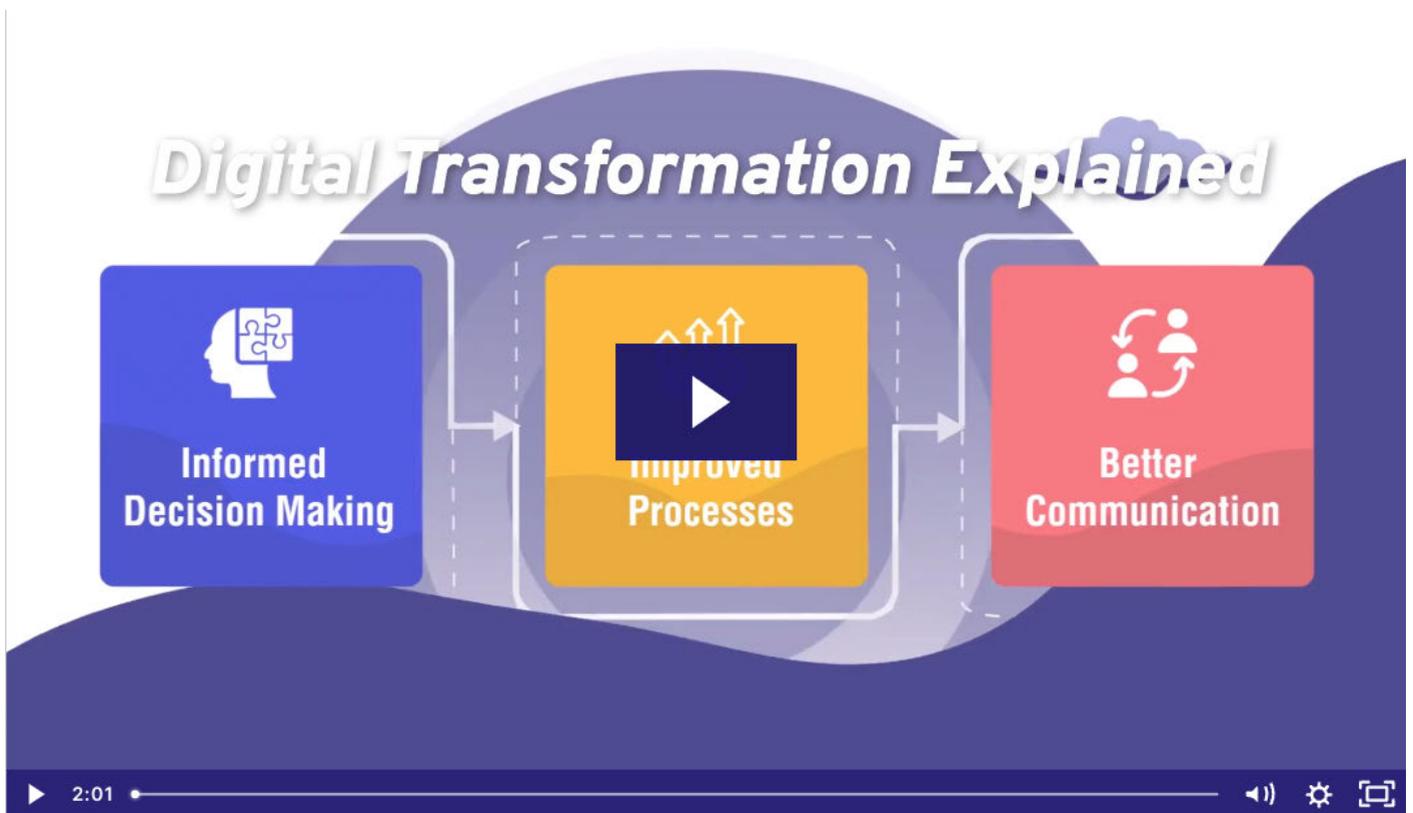
What is Digital Transformation?

Successful organizations embrace digital technologies because **they know this generates greater value for customers and provides an environment for employees to thrive** – which equals higher profits for the business. Digital Transformation is the **single most important opportunity that enables organizations to leverage technologies** across all aspects of the business.

Why does it matter?

Done properly, businesses reap the benefits of more informed decision making, improved processes, and better communication. All resulting in **exceptional client experience and improved bottom line**. When done ad-hoc, businesses risk employees becoming less productive, processes breaking down and clients getting frustrated - potentially leading to customers and employees looking toward the competition.

What is the challenge?

In the past, savvy executives looked for new growth opportunities then implemented technologies, such as CRM to boost sales, line of business applications to get more visibility into the business, or team collaboration tools to improve internal communication. **However, these initiatives did not always go as anticipated**. Some failed entirely, others delivered less than desired results, and many just went way over budget.

Why are there so many failures?

The reason failure has been so common is twofold. First, Internal **IT personnel and outsourced IT providers do not understand the business** and tend to focus solely on technology. Then, **they do not provide a systematic approach for executives to uncover opportunities, plan initiatives, and successfully execute projects**. Keeping up with change and staying ahead of the curve requires businesses to employ a systematic approach to ensure Digital Transformation initiatives are well planned, flawlessly executed, and rapidly adopted across the organization.

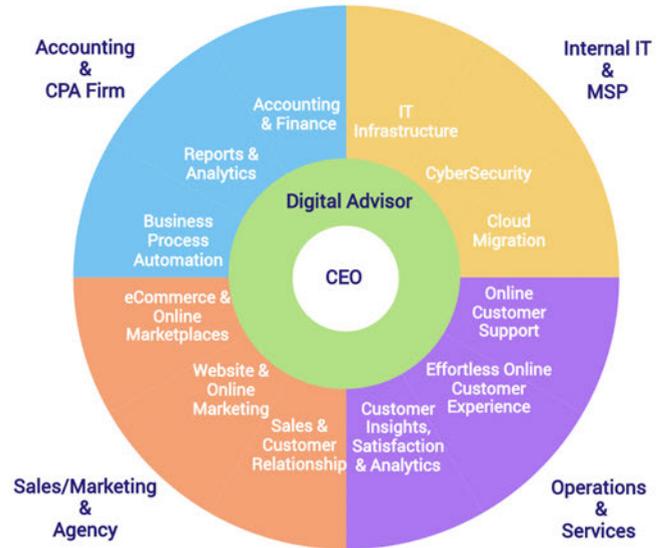## How to make it simple?

Our mission is to **make Digital Transformation Simple**. It provides a simple framework, tools, guidance, and resources for businesses to get the most out of digital technologies that lead to lasting innovation and success.
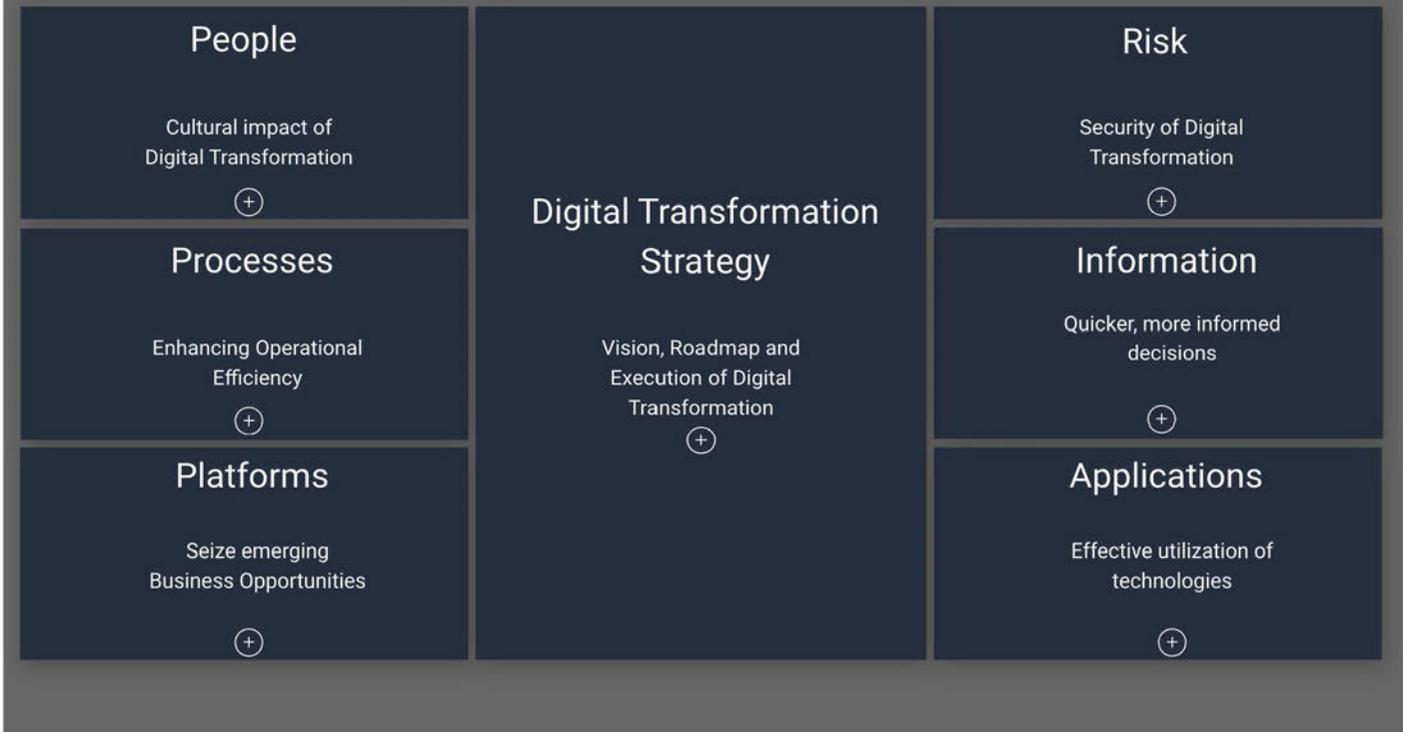
Align your Team to Become Competitive in the Digital Economy

From Implementing Digital Tools Ad-Hoc to Get Positive Return on Technology Investments
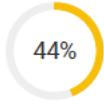
Digital Maturity Model

People
Cultural impact of Digital Transformation
⊕

Processes
Enhancing Operational Efficiency
⊕

Platforms
Seize emerging Business Opportunities
⊕

Digital Transformation Strategy
Vision, Roadmap and Execution of Digital Transformation
⊕

Risk
Security of Digital Transformation
⊕

Information
Quicker, more informed decisions
⊕

Applications
Effective utilization of technologies
⊕

Why Digital Transformation?

1 Increase Profits
80% of organizations that have completed digital transformation report increased profits.*

2 Increase Revenues
69% of companies with a Digital Transformation plan report increased revenues vs. just 27% of companies without a plan.**

3 Enhanced Customer Experience
Through data-driven customer insights companies are increasing their sales and customer retention

4 Increased collaboration, productivity & agility
Through streamlined workflows, task automation and improved data insights and collaboration throughout the organization

*Reported by the SAP Center for Business Insights and Oxford Economics
**SMB Technology Directions For A Changing World report by SMB group

Sample Business Improvement Quick Scores

44%
Business Capability Improvement Quick Score

36%
Digital Maturity Quick Score

80%
Technology Capability Quick Score

Business Capability Improvement Quick Score

| Capability	Score
Finance - Accounting, financial planning and auditing processes	8
Operations - Production, distribution and service processes	7
Marketing - Promotion, online marketing and demand generation processes	2
Sales - Lead generation, new client acquisition and account management processes	2
Human Resources - Recruitment, retention and development processes	1
Client Experience - Client onboarding, client service and client support processes	9
Management - Planning, execution and organization processes	2
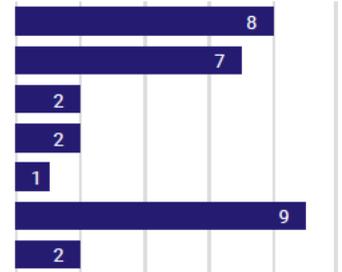
Digital Maturity Quick Score

Capability	Score
People - employee productivity, collaboration and communication	1
Processes - operation efficiency, documented processes and projects	6
Platforms - social media, eCommerce and service platforms	1
Applications - application and digital service selection, implementation and adoption	4
Information - information access, management and quick decisions	5
Risk - digital infrastructure management, security and performance	5
Strategy - digital vision, strategy and competitive technology advantage	3
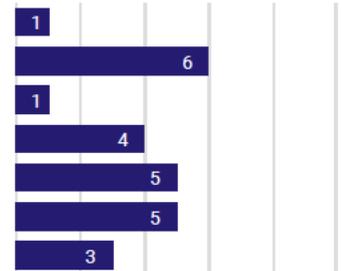
Technology Capability Quick Score

Capability	Score
Cloud Infrastructure Readiness - Office Suite, File Share & Sync and Permission Control	8
Communication Readiness - Collaboration, Messaging and Email	7
Office Infrastructure Readiness - Equipment, Performance and Printing	9
Remote Work Readiness - User Devices, Mobility and Productivity	9
Business Continuity Readiness - Connectivity, Backup and Disaster Recovery	9
Policy and Compliance Readiness - Government, Industry and Internal Compliances	9
Cybersecurity Readiness - Network, Endpoint and User Protection	5
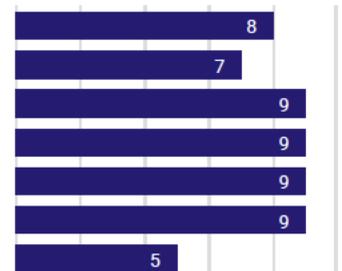
Digital Adoption Plan

An effective 4-step process with compliance

Developing a Digital Adoption Plan as a standard operating procedure with compliance.

Digital Adoption Plan

Business Improvement Review

Making sense of Dx. Is Digital Transformation right for you? What's the best way to proceed?

Digital Assessment

Assess challenges, identify opportunities and set priorities in order to increase productivity and enable growth.

Discovery & Software Analysis

Discovery, research, and analysis of the systems, integrations, and workflows required for your business.

Digital Strategy Plan

Create a clear vision and a plan with accountability to execute the needed business-technology initiatives.

Digital Adoption Plan Timeline

Task	Month	1.	2.	3.	4.	TBD
Business Improvement Review						
Client Engagement Agreement						
Digital Assessment						
Digital Action Plan						
Discovery & Software Analysis						
Digital Strategy Plan						
Plan Submission						
Plan Implementation						
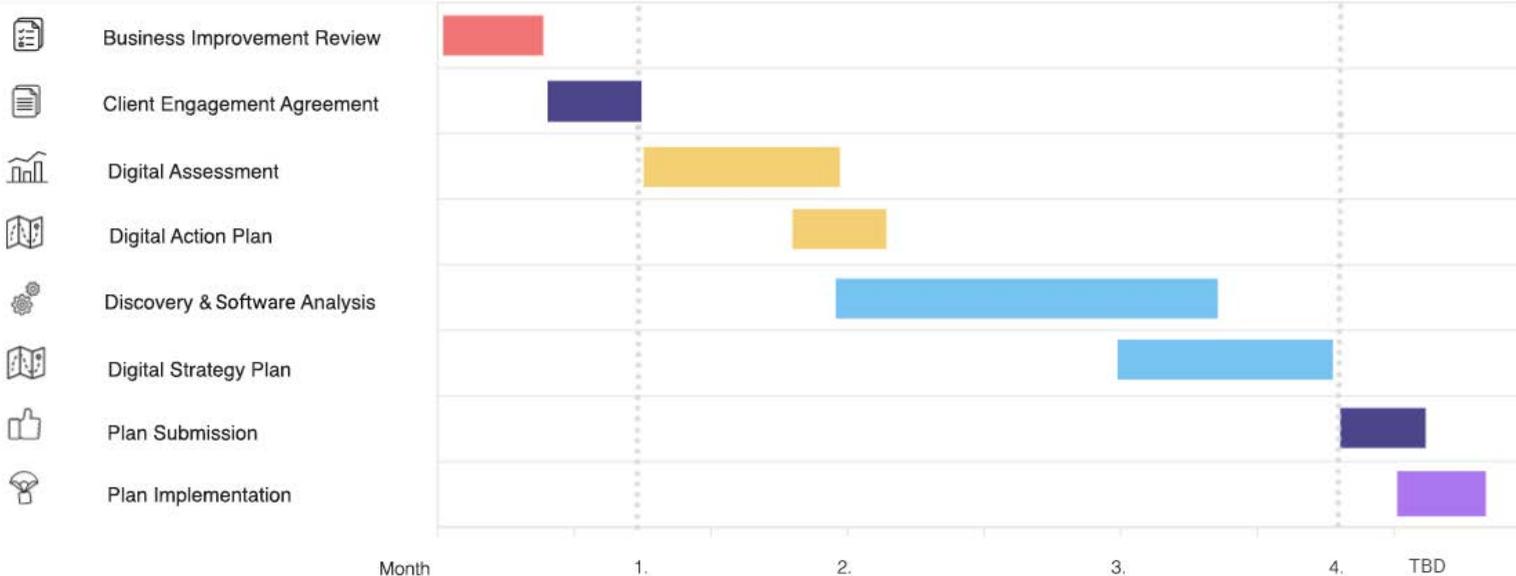
Digital Assessment Deliverables

Education, Assessment, Internal Analysis and Informed Decision Making

Running the business without a proper Digital Strategy risks being left behind as competitors successfully embrace digital transformation. Research has been done recently among small and mid-size businesses. It proves that having and implementing a Digital Strategy correlates to the success of the given business. The further ahead the organization is with digital transformation, the more growth it can expect.

Results

A Digital Assessment provides a very comprehensive Digital Action Plan designed for busy small and medium-sized executives.

- Proven Process with 3x90 minute consultation sessions
- Business Review Quick Scores to set business priorities very quickly
- Digital Maturity Questionnaire to get a 360-degree view of your digital capabilities
- Digital Maturity Score to take measurements in the seven most critical areas
- Digital Strategy Plan to list action steps with recommendations to achieve the business outcomes
- Budget Estimate to see the expected return on the implementation of digital solutions

Digital Assessment Deliverables

Find opportunities, get direction and set a course of action

1

BUSINESS IMPROVEMENT QUICK SCORES

Do we know the business improvement priorities that digital transformation need to support?

ⓘ

2

DIGITAL MATURITY SCORE

Do we know the current state of digital maturity and where the organization needs improvement?

ⓘ

3

DIGITAL MATURITY ACTION PLAN

Do we know know the short term quick-wins and the long term initiatives that deliver the highest return on digital transformation?

ⓘ

Deliverable 1. Business Improvement Quick Scores

There are three important areas that can help with Business Improvements. Quick scores help to identify priorities.

- Business Capabilities - do we need to develop business capabilities to reach our goals?

- Digital Maturity - do we need to leverage digital technologies to support business capabilities?

- Technology Readiness - do we need to support the business with the right technologies?

Deliverable 2. Digital Maturity Score

Successful organizations everywhere are embracing Digital Transformation because they understand it is the single most important opportunity that enables them to leverage technologies across all aspects of their business.

It all starts with an accurate measure of the company's Digital Maturity. Put simply, Digital Maturity is the state of an organization's progress through the Digital Transformation process. A Digital Maturity Score is an accurate measure of the current state of Digital Maturity.

Like EBITDA reflects the health of profitability, a Digital Maturity Score provides a measure of the Digital Transformation status.

Deliverable 3. Digital Maturity Action Plan

The Digital Transformation Action plan provides clarity on exactly which projects need to happen and when. Teams become aligned on the expected business outcomes, and the growth opportunities are going to be prioritized. As the plan provides a map and a compass it is now easier to navigate through the digital transformation journey.

Digital Assessment Process

Quick Score, Assessment, Benchmark and an Action Plan

Successful organizations everywhere are embracing Digital Transformation because they understand it is the single most important opportunity that enables them to leverage technologies across all aspects of their business.

It all starts with an accurate measure of the company's Digital Maturity. Put simply, Digital Maturity is the state of an organization's progress through the Digital Transformation process. A Digital Maturity Score is an accurate measure of the current state of Digital Maturity.
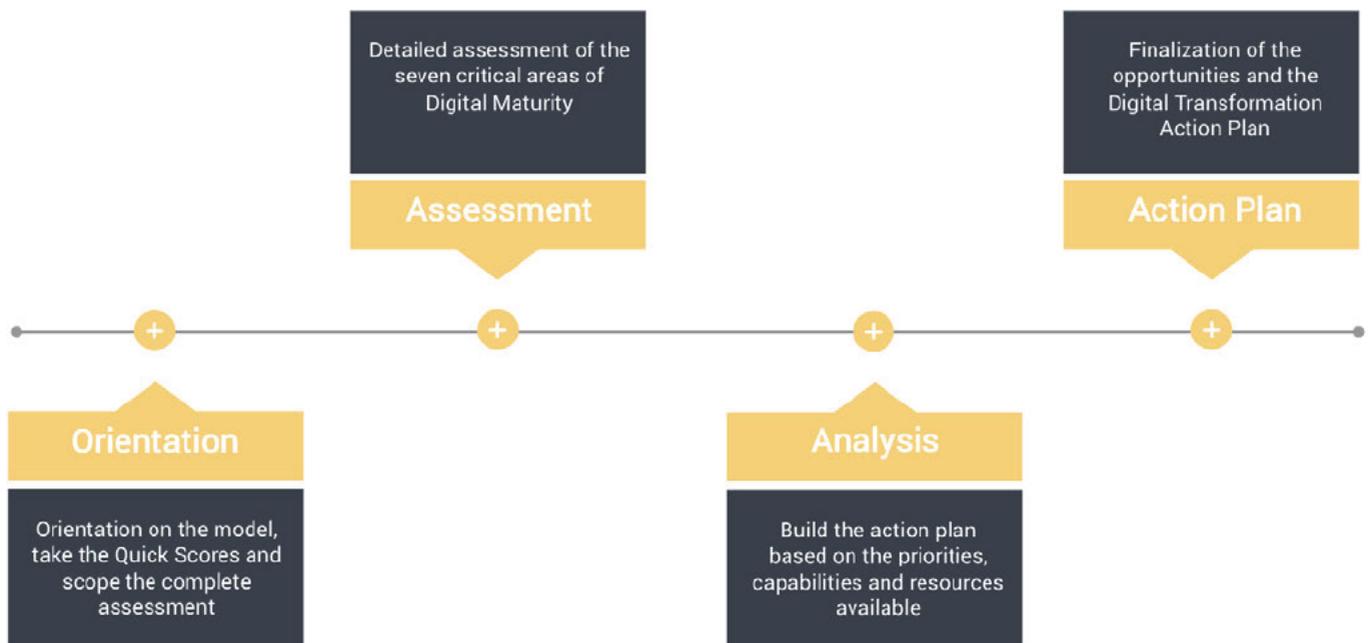
Like EBITDA reflects the health of profitability, a Digital Maturity Score provides a measure of the Digital Transformation status.

Results

The benefits of using a Digital Maturity Score are many. Executives gain clarity on exactly which projects need to happen and when Teams become aligned on the expected business outcomes Growth opportunities will be easier to identify and act on Progress becomes measurable and easier to manage Provides a map and a compass to better navigate the Digital Transformation journey The first step for executives interested in better business outcomes is to obtain a Digital Maturity Score by performing a Digital Maturity Assessment. This will pave the way for better Digital Transformation Planning.

Digital Assessment
Find opportunities, get direction and set a course of action

Detailed assessment of the seven critical areas of Digital Maturity

Assessment

Finalization of the opportunities and the Digital Transformation Action Plan

Action Plan

Orientation

Orientation on the model, take the Quick Scores and scope the complete assessment

Analysis

Build the action plan based on the priorities, capabilities and resources available

Step 1. Orientation Call

During this short call, the Advisor explains the main concepts of Digital Transformation and the Digital Maturity Benchmark Process.

Then the Advisor takes a quick mini-assessment to find hotspots and priorities that need to be discussed at the assessment meeting.

Finally the advisor schedule the Assessment Meeting to make sure all key people from the organization can participate.

Step 2. Assessment Meeting

The Assessment Meeting is a 60-90 minute session. The Advisor explains the 7 Digital Maturity Areas and then goes through the questions.

The team decides on what is the current state and what is the ideal future state of the different areas.

The Advisor confirms the priorities and also looks for additional context and information to be able to generate the proper action plan.

Step 3. Internal Analysis

The Advisor goes through the scores, notes and priorities and starts building up the action plan with recommendations. The Advisor is backed by industry best practices, team and support. The Advisor generates an action plan with themes, recommendation projects and scope of projects.

Step 4. Action Plan Meeting

The Action Plan meeting is a 60-90 minute session. The Advisor explains the findings of the assessment and explains the recommended action plan. The team discusses the potential action items, opportunities, challenges and requirements to set the future digital transformation initiatives for success.

The process ends with a final version of the roadmap handoff to the client.

Digital Strategy Plan Deliverables

Vision Statement, Strategy Map, Roadmap and Execution Plan

In order to do the right projects right, we need both a Strategy and proper Execution. We have developed proven methods for both activities. This way the Company Objectives can be supported by a Digital Transformation Strategy Process and the execution of projects can be supported by a Digital Transformation Opportunity Discovery Process.

The Strategy part discovers Strategic Opportunities and establishes the foundation for a winning Digital Transformation Initiative.

Results

This process helps the organization to connect its Corporate Strategy to its Business Outcomes with a well defined and executed Digital Transformation Strategy

- Discover company-wide opportunities they can untap with Digital Transformation
- Discover company-wide challenges they can tackle with Digital Transformation
- Create a shared vision with the team
- Create a Visual Map of how to achieve the vision
- Create a Step-By-Step Roadmap of what to do
- Create the foundations for execution and accountability
- Get the team aligned on priorities
- Get buy-in from the team and choose a champion for the execution

Digital Strategy Plan Deliverables

Proven process of generating a winning Digital Transformation Plan

1

DX VISION STATEMENT

Do we know how the customer experience, employee productivity and company value can be improved by Dx?

ⓘ

2

DX STRATEGY MAP

Do we know the strategic themes, initiatives and projects are going to contribute to the Dx Vision?

ⓘ

3

DX ROADMAP

Do we know the timeline, milestones, resources needed to accomplish all the initiatives on the Dx Strategy Map?

ⓘ

4

DX EXECUTION PLAN

Do we know how to manage the upcoming risks, issues, deadlines and teamwork to execute the plan efficiently?

ⓘ

Deliverable 1. Develop your Digital Strategy Vision

A Digital Strategy Vision Statement will give your company a direction on how customer experience, employee productivity, management capabilities, and company value can be increased.

Deliverable 2. Plan your Digital Strategy Business Map

A Digital Strategy Business Map connects your company's financial objectives to digital transformation. It clearly defines what capabilities need to be developed in order to improve business processes that will lead to improved client experience, which moves the needle on your financials.

Deliverable 3. Plan your Digital Strategy Roadmap Plan

A Digital Transformation Roadmap is a set of projects that lead the company to achieve its Digital Vision through the execution of the Digital Strategy. A roadmap helps the company to see requirements for success one step at a time.

Deliverable 4. Execute your Digital Strategy Initiatives

Plans are meaningless without diligent execution. Project management, vendor management, application implementation, and making the team accountable are just some of the activities that help business owners to realize their digital potential.
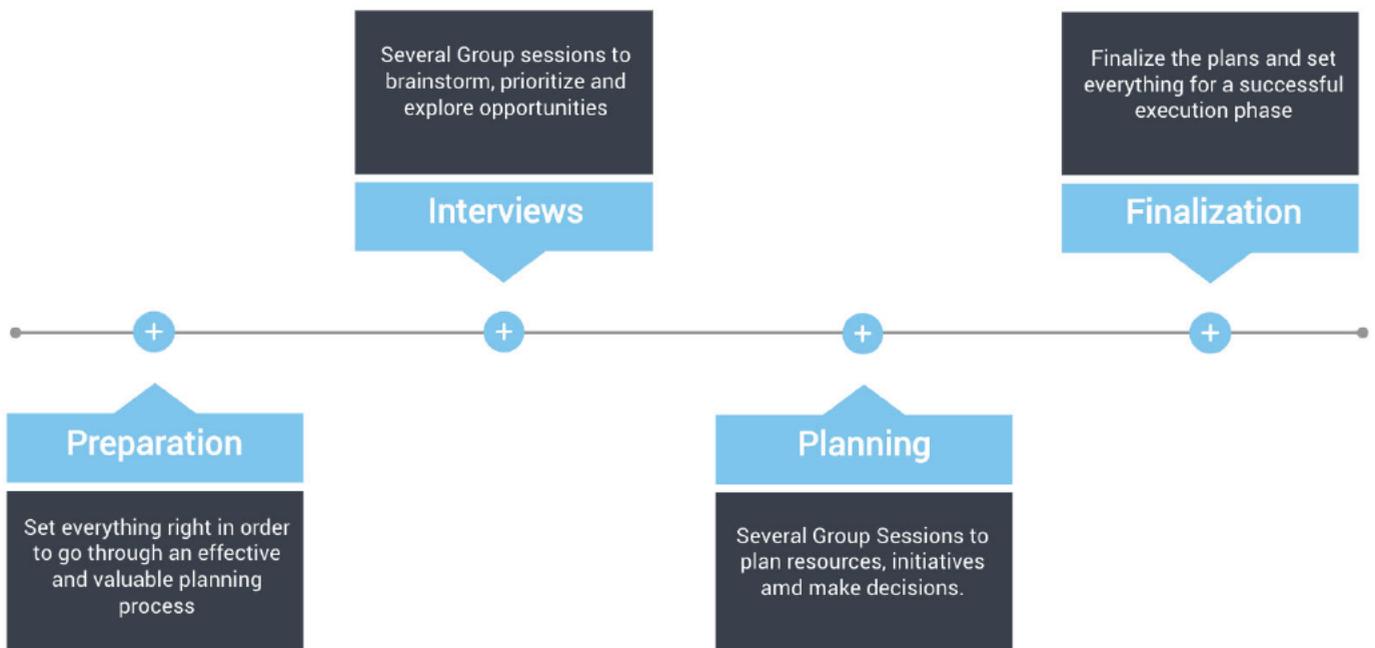
Digital Strategy Plan Process

We know all this can seem like a lot. Don't worry though. We will literally take care of everything. All you need to do is to tell us when you want to start.

The Proven Process of generating a winning Digital Strategy Plan

The process is a set of specific discovery groups and private workshops followed by internal analysis. Then the results are discussed and decisions are made in order to create a plan.

Digital Strategy Plan

Proven process of generating a winning Digital Transformation Plan

Several Group sessions to brainstorm, prioritize and explore opportunities

Interviews

Finalize the plans and set everything for a successful execution phase

Finalization

Preparation

Set everything right in order to go through an effective and valuable planning process

Planning

Several Group Sessions to plan resources, initiatives amd make decisions.

Step 1 - Preparation

- Kickoff meeting with Champion / Project Owner
  - Schedule Sessions
- Scope Digital Strategy Vision
  - Direction on each of the six parts for the Digital Strategy Vision Statement
  - Identify the potential Strategic Themes for the Digital Strategy Business Map

- Stakeholder Interviews with Team Members / Executives
  - Validate Digital Strategy Vision Statement Elements - Alignment
  - Confirm Strategic Themes
  - List Potential Projects inside the Strategic Themes
  - Validate Strategic Opportunities
- Information needed for
  - 2nd Draft Digital Strategy Vision
  - 2nd Draft Digital Strategy Business Map
  - Draft Digital Strategy Roadmap
  - Draft Digital Strategy Execution Plan

- Group Meeting with Team
  - Finalize Digital Strategy Vision and Business Map
  - Set Priorities on the Digital Strategy Roadmap
  - Prepare the Execution on the Digital Strategy Execution Plan
- Internal Work
  - Follow up questions
  - Finalize documents
- Deliverables
  - Finalized Digital Strategy Vision
  - Finalized Digital Strategy Business Map
  - 2nd Draft Digital Strategy Roadmap
  - 2nd Draft Digital Strategy Execution Plan

- Group Meeting with Team
  - Finalize Digital Strategy Roadmap and Digital Strategy Execution Plan
  - Set The First Quarter's Action Items
  - Schedule the Digital Strategy Pulse Meetings
  - Communication Plan
- Deliverables
  - Finalized Digital Strategy Vision
  - Finalized Digital Strategy Business Map

- Finalized Digital Strategy Roadmap
- Finalized Digital Strategy Execution Plan
- Scheduled Digital Strategy Pulse Meetings

Digital Solution Plan Deliverables

Group Workshops, 1-1 Meetings, Internal Analysis and Informed Decision Making

In order to do the right projects right, we need both a Strategy and proper Execution. We have developed proven methods for both activities. This way the company's objectives can be supported by a Digital Transformation Strategy Process and the execution of projects can be supported by a Digital Transformation Opportunity Discovery Process.

The Discovery part focuses on specific Digital Transformation Opportunities and establishes the foundation for winning Digital Transformation Projects.

Results

These projects help the organization to dive deep into several Digital Transformation topics quickly and assess the opportunities. This will let the leaders set direction and get alignment with the team.

- Discover issues together with the team
- Get the team aligned on chosen improvement areas
- Find quick wins to build momentum
- Get the team aligned on priorities
- Establish a plan for future developments
- Get buy-in from the team and choose a champion for the execution

Digital Solution Plan Deliverables

Solve business problems by creating a plan for a solution

1

PROJECT VISION STATEMENT

Do we know the goals, expected results and the very narrow scope of the project?

ⓘ

2

PROJECT TIMELINE PLAN

Do we know the project milestones, tasks, resources and the people accountable for the outcomes?

ⓘ

3

PROJECT EXECUTION PLAN

Do we know how to manage the upcoming risks, issues, deadlines and teamwork to execute the plan efficiently?

ⓘ

Deliverable 1. Project Vision Statement

Most Dx (digital transformation) Projects fail because of a lack of planning and alignment. The team needs direction on the expected outcomes of every particular project.

A Project Vision Statement is a clear definition of the purpose, description and measurable results of the project. That helps to get the team aligned and scope the deliverables for success.

Deliverable 2. Project Timeline Plan

Dx Projects could easily run over budget and time if the proper steps are not defined ahead of initiation of the project. The team needs a plan for who is going to do what by when.

A Project Timeline Plan breaks down the executables into milestones, steps, and the individuals who will be accountable in executing the project.

Deliverable 3. Project Execution Plan

Dx Projects are usually fairly complex initiatives with technology people, business people and all the users involved. The team needs a process that will keep them aligned during the execution of the process.

A Dx Project Execution Plan manages the risks, hot-spots, accountable individuals, measures, priorities, and the required resources to set a project for success.

We know all this can seem like a lot. Don't worry though. We will literally take care of everything. All you need to do is tell us when you want to start.

Here's what the process looks like once we do.

The Proven Process of planning a winning Digital Transformation Project

The process is a set of specific discovery groups and private workshops followed by internal analysis. Then the results are discussed and decisions are made in order to finalize a plan.

Digital Solution Plan

Solve business problems by creating a plan for a solution

Group Meeting	Analysis
Identify goals, expected results, deliverables and get buy-in from team	Finalize the Project Vision Statement, the Timeline Plan and the Execution Plan

Kickoff Meeting
Identify the problem, the team and the process for the resolution

Interviews
Dive deeper into the issues, the resources and the potential solutions

Finalization
Get final alignment with the team about the Vision, Timeline and the Execution Plan

Step 1 - Kickoff Meeting
- Kickoff meeting with Champion / Project Owner
- Deliverables
  - Identify scope, goals and expected results
  - Identify process and team
  - Schedule the sessions

Step 2 - Group Meeting

- 10 Point Exercise with the Stakeholder Group
- Deliverables:
    - Draft Dx Project Vision
    - Identify goals, expected results, and deliverables
    - Identify constraints, risks, hot-spots, and next steps

Step 3 - Stakeholder Interviews

- Stakeholder Interviews with Dx Project Team Members / Executives
- Deliverables
    - Finalizing Dx Project Vision
    - Draft Dx Project Timeline Plan
    - Draft Dx Project Execution Plan

Step 4 - Internal Analysis

- Internal Analysis with team members
- Deliverables
    - Finalizing Dx Project Timeline Plan
    - Finalizing Dx Project Execution Plan
    - Identify potential partners, vendors, and solution
    - Identify potential use cases, references, and examples

Step 5 - Findings Meeting

- Group Meeting with Dx Project Team
- Deliverables:
    - Finalizing the plans

Your Certified Digital Advisors

Business owners who work with a Certified Digital Advisor are provided with a personal guide and digital translator. Advisors have been carefully vetted, trained, and certified, ensuring business owners are inspired and gain practical and actionable value. Not just anyone is cut out to be a Certified Digital Advisor.

Advisors are Practical

Business objectives can be achieved faster by applying digital solutions that stand the test of time. Advisors filter the noise and present meaningful and practical solutions.

Advisors are Great Communicators

The best advice in the world is meaningless if you cannot understand it. Advisors help business owners to connect the dots with simple and clear language.

Advisors are Leaders

Nothing kills momentum faster than poor execution. Advisors lead teams to deliver projects on time and on budget.

Your Trusted Approved Digital Advisor

Michael-James Pennie

Managing Director

Online Marketing Systems Inc.

admin@onlinemarketingsystems.ca

- 15+ Years Experience in Delivery of Competitive Analysis and Digital Technology Strategic Plans
- CDAP & DMAP Approved Advisor
- Digital Maturity Group Certified
- Google Partner, Google Ads & Analytics Certified
- BC Premier's Technology Council Advisor - 2010
- BC Ministry of Economic Development Web Technology Advisor - 2008
- Speaking: Beijing International Business & Technology Summits, Vancouver Enterprise Forum, Enterprize, Business News Network
- Media: Global News, CTV, CBC, CKNW, Sun News UK, CKPG, CityTV, Business News Network, Vancouver Sun, Province, Globe & Mail, Business in Vancouver, BC Tech Magazine, Cover of Make it Business Magazine, The Georgia Straight, Techvibes.

Next Steps

We sincerely look forward to working with you in ensuring that your organization utilizes the full scope of the needed digital technologies that can enable your business to grow.

- Develop marketing technology systems to reliably scale the business verticals
- Better manage processes in the business
- Improve client experience
- Improve productivity and efficiencies
- Increase your EBITDA and the value of your company

Next Steps

1. Review the **Scope of Work** Together

2. Sign off on the **Client Engagement Agreement**

3. Complete **initial deposit** to commence the Scope of Work

4. We'll schedule and perform the **initial orientation meeting** and get everything on track