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DiGence

Created by Geeks

Start evolving with clear insights

A workbook to help start bringing clarity
to your tech strategy

How this workbook will help

- 01 Articulate your ambition that will become the foundation of your tech strategy
- 02 Frame what change looks like
- 03 Decide on what's important and what's standing in your way
- 04 Distill initial insights of what needs to be investigated and validated

Before you begin...

- 01 Know your immediate and long-term business' goals and requirements
- 02 Have an idea of what works and what needs to change
- 03 Know what departments will be involved in your transformation journey
- 04 A list of current systems

Articulating your tech ambition

Your tech ambition must be aligned to business goals. There's little point in getting excited about the latest tech that has no alignment to what you need to achieve. Sometimes, the simplest strategies can create the biggest impact.

Long Term Goals

Where do you see your company in the next 3 years?

- Increase locations from 9 to 30
- Streamline communication to enable efficient work practices
- Delivering an exceptional and seamless client journey

Medium Term Goals

What are some smaller goals you would like to achieve?

- Introduce a reporting service for performance analysis
- Switch to cloud-based architecture for data storage
- Streamline the onboarding process for new employees

In which ways do you see your technology supporting these medium and long term goals?

1. Automating Manual Processes

This will allow for employees to deliver more value because they're freed from menial tasks. Focusing more effort on what makes a real difference for the customer.

2. Dashboard

A unified view that will reduce time spent on separate tasks and increase efficiency. In turn, more time can be spent on improving other aspects of the business.

3. Reporting

A better way of storing and using data will allow us to analyse and improve our services.

YOUR TURN

What are your business goals and how do you see technology aiding this push?

Long Term Goals

Where do you see your company in the next 5 years?

In which ways do you see your technology supporting these medium and long term goals?

Medium Term Goals

What are some smaller goals you would like to achieve?

HOW THIS WORKBOOK WILL HELP

Framing desired outcomes

Below is an example of a change framework, which helps to identify the areas where your strategy will have the most impact. Our advice is to think both big and 'small' to inspire stakeholders about the potential of the project while reassuring them of its feasibility.

FROM

TO

Disjointed, hard to use systems.



One accessible, functional and easy to use system that connects all disciplines.

A confusing client experience with many manual steps.



A central dashboard that clients can access reports and streamline communications.

Manual onboarding journey with training articles on paper.



A digital handbook and workplan massed with all real-time training materials.

Little documented HR processes.



A database filled with HR processes.

YOUR TURN

What are your current business & process challenges vs where you aim to be?

FROM

TO



Articulating your priorities and hypothesis

- 01 This step will help you to articulate and commit to your current priorities in implementing new technologies
- 02 Next, you will identify the blockers that are stopping you from delivering on your priorities
- 03 Reflect on your challenges and set up hypotheses on what could be the source of these blockers
- 04 This last step, will help you combine your priorities, blockers and hypothesis and help you distill initial insights

Questions to ask

- 01 If you had unlimited resources, what would you solve first?
- 02 What's blocking you in achieving your priorities?
- 03 What could be the root cause or source of the blockers that are stopping you from achieving your priorities?

Committing to priorities

Where do you see your current priorities in implementing new technologies? An example could be streamlining client communication via a centralised dashboard. Here are some examples to get the juices flowing.

Priority 1

Implementing a centralised way of working



Why is this a priority?

We currently have employees working on different projects but using different tools and software. We need a unified, consistent delivery of works.

Priority 2

Have a coherent, united strategy based on data



Why is this a priority?

Our heads of department all have a different vision based on personal preferences. We need an objective, data driven roadmap.

Priority 3

Improve the client journey & increase our NPS score



Why is this a priority?

Our clients interact with multiple touch points but progress is not captured in one centralised system. A streamlined way would benefit all parties.

Priority 4

Create a database for processes and training



Why is this a priority?

Our employees all have different experiences in training due to little documentation. This leads to a difference in quality of work delivered.

YOUR TURN

If you had unlimited resources, what would you solve first?

Priority 1



Why is this a priority?

Priority 2



Why is this a priority?

Priority 3



Why is this a priority?

Priority 4



Why is this a priority?

YOUR TURN

What's blocking you in achieving your priorities?

Example

Lack of resources (time, money, etc).

Explanation

We do not have the capacity to give focus to this right now.

Example

Split opinions in strategy.

Explanation

We have various different voices with no direct vision in our current strategy.

Distilling your insights

You've taken stock of where you want to go and what matters most in your tech evolution journey, now's your chance to reflect on your greatest challenges to reaching your tech ambition.

Hypothesis 1

Most of our processes are manual



Why is this an issue?

We are wasting valuable time and resources on completing repetitive tasks that could be automated.

Hypothesis 2

We have little systematic checks and balances



Why is this an issue?

There is nothing in place that currently monitors work until there are client complaints. This is poor for reputation.

Hypothesis 3

Very few of our processes are documented



Why is this an issue?

We have a terrible tendency to not document a process. This has caused different interpretations of our delivery, affecting consistency.

Hypothesis 4

We have many small mistakes



Why is this an issue?

Due to inconsistencies in our delivery, we often make small mistakes only caught when the client complains.

YOUR TURN

What are the biggest issues that create these blockers to achieving your priorities?

Priority 1	▶	Hypothesis 1	▶	Why is this an issue? <input type="text"/>
Priority 2	▶	Hypothesis 2	▶	Why is this an issue? <input type="text"/>
Priority 3	▶	Hypothesis 3	▶	Why is this an issue? <input type="text"/>
Priority 4	▶	Hypothesis 4	▶	Why is this an issue? <input type="text"/>

Now that you know what's holding you back,
it's time to discover what will take you forward.

**Get in touch to make data-driven decisions
about your systems, processes and priorities
with DiGence.**

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