



Introduction to Digital Transformation

Purpose

This Guide will introduce you to digital transformation, including key concepts, common pitfalls and best practice approach.

Agenda

- Introduction
- Methodology and Frameworks
- Agile Introduction
- Cloud Technology
- Case Study / Stories of Transformation

What is Digital Transformation

- There are lots of definitions of Digital Transformation.
- Digital – describes electronic technology that generates stores and processes data
- Digital technologies are electronic tools, systems, devices and resources that generate, store or process data

= INFORMATION & DATA

- Transformation: a complete change in someone or something. The way in which we work has undergone a complete change
- **“Applying the culture, practices, processes and technologies of the internet-era to respond to people’s raised expectations”.**

What does this mean in practice?

- Re-thinking how your organisation uses technology to improve the way people and processes work together.
- Integrating digital across the organisation to deliver vision, create value, to improve user / client services and develop a competitive advantage
- Challenging business (operational) process to getting things done in agile and intelligent ways, usually powered by data and automation.
- Digital transformation is subjective to the organisation or to the problem they are trying to solve.

Key Concepts / Core principles

- Digital is not a single person's job. Digital is everyone's responsibility.
- Integration is important. Information shouldn't exist in silos or be duplicated across multiple systems.
- Value proposition: digital should **add value**. Don't be digital for digital's sake. Digital isn't always the answer to solving your problems.
- Synchronization: Data synchronization ensures accurate, secure, compliant data and successful team and customer experiences.
- Don't think of start and end points, think of digital as a continuous cycle
- Focus on solutions not products and identify problems your service users might not even know they have

Regardless of what sector, organisation or problem, you can reduce this to:

- **Information:** what information do I need to collect e.g. volunteer sign up
- **Process:** volunteer goes to website and information goes into organisation database
- **Technology:** web form, connected to CRM

Why think about Digital?

- What do I need to do differently to **what** I'm doing now?
- What problems are my stakeholders having – internal and external?
- What processes and services could be streamlined or redesigned to give a better experience?
- How might I reach more people or engage with more people in a different way?
- **How** can digitisation help achieve that?

What might this involve?

- Moving services online e.g. migrating to Office 365
- Redesigning a new website
- Setting up a chatbot
- Introducing a database or CRM
- Developing new digital tools
- Extending reach of services
- Running online training or events
- Developing an App
- Building a community platform for members or volunteers.
- Service Delivery
- Service Design

How do you go about Digital Transformation?

DX – How?



Is not.... 

- About building something new and shiny
- Start building a solution before understanding the problem (What/Why) ?
- Necessary Expensive
- Big and scary

It is... 

- Understand real drivers and behaviors
- Re-usage. Leverage what is already out there
- Continual learning and improving – Iterative
- Inclusive and collaborative & Embedded across an

Learn more about digital transformation Stop sharing Print

- Building something new can take a long time and might be costly.
- Most important of all is about being iterative – learning, testing concepts
- Not just the start or the end, it's the process in between

Digital Organisation Culture

Mindset shift required in the organisation e.g. switching from paper to paperless

- Leadership. Change comes from the top. Make sure the senior management are on board.
- Bring in expertise when you need it e.g. having a digital expert on your board of trustees to drive the process
- Be transparent about what you are doing
- Being told what to do after it has happened is a sure way to lose people's engagement.
- Talk to people at the earliest stages to get buy in
- Check in regularly to make sure people are 'on the journey' with you
- Embed culture change as part of staff meetings, supervision, talk about with your stakeholders
- Be open to getting things wrong, but learn from the process and improve as you go
- Test out your assumptions and ideas with different stakeholders
- Share your story and link in with others. Lots of charities are approaching digital for the first time and are looking to learn from each other.
- Try out collaboration tools.
- Build cross-functional teams and involve experts from all areas of your work. Everyone will have their own ideas so bringing these together and finding the common ground.

Digital Service Design

- How do you deliver services
- How do you connect them
- How do you exchange information e.g. between employees and volunteers
- What are the needs of your users
- Start with user needs
- Do less
- Design with data (research, qualitative and quantitative data)
- Do the hard work to make it simple.
- Iterate. Then iterate again
- This is for everyone
- Understand context
- Build digital services, not websites
- Be consistent, not uniform
- Make things open: it makes things better
- Understand the consequences of what you are doing – intended and unintended.

Digital Technology

- What are the tools that facilitate those changes?
- Transformation should be helping to improve your current processes, not just being digital for the sake of it.
- How do we acquire those tools? Do they exist? Do we develop new tools? What about costs?

People, Process and Technology

- Digital transformation is a combination of all these things.
- People and buy-in are essential to successful transformation and should be involved in the process as far as possible.
- Using data to help evidence the needs and whether the solution is working.
- Collaborating is key – digital needs to involve all the stakeholders to work effectively. People don't want to feel like this is being imposed on them, they need to be taken on the journey with you.
- Mindset: being open to change, whatever the change means.
- Brining in new talents – do you have the right skills to move forward on your digital journey?
- Adding value is key: you might have all the data in the world, but if it isn't adding value then you are not transforming.
- Dot do things in isolation. It's all well having a CRM, but if this is disconnected to the other tools and systems then you are, then you are operating in a silo.
- More digital tools doesn't necessarily mean you are being more digital. Unless these tools add value and lead to improvements, they may actually be getting in the way.
- Can be an emotional process! Some will embrace change, others will resist and the rest will be somewhere in between.

Approach

- Strategy isn't what you write down – it's about what you do and deliver

- Ground-breaking
 - Collect data through user research. This helps you define what the problems might be. You can then develop a problem statement
 - How are others solving these problems?
- Experimenting
 - What do you need to do to test out your approach?
 - Can you build a dummy form and test that with users
 - Develop a prototype website or new tool
- Piloting
 - Generate enough interest across the organisation or with stakeholders
 - Test out your tool or prototype
 - Get feedback, iterate,
- Scale up

What is Agile

“Agile project management is an iterative approach to delivering a project throughout its life cycle.”

“Agile is not as much a methodology as it is a set of values, ideals and goals.”

- People
- Purpose
- Collaboration
- Sense and Respond

Iterative Process

DX. – Agile Process

Iterative Process

- Scope
- Define
- Develop
- Evaluate



- **Evaluate:** look at the current organisation processes, structure etc.

- **Scope:** research, identify problems, identify suggestions for what a solution might look like
- **Define:** refining your suggestions into something workable. Who are we trying to help and how will this help?
- **Develop:** tools and prototypes to test out your ideas. Being inclusive is very important. Don't exclude users from the process by designing services or tools that they can't access
- **Evaluate:** check back with users whether the 'solution' is helping or not. Understand what improvements are needed and feed this back into the Agile process.
- **REPEAT**

Agile - Benefits



The Big 6 Digital Technologies

1. Cloud & Virtualization
2. Big Data & Data Analytics
3. IoT
4. AI, ML, MI
5. 5G & Future Communication
6. Blockchain & DLT



Cloud and Virtualisation

Big Data and Data Analytics

- How you collect ,manage and retain your data
- How do you create value from that data. How do you use data to make it
- Growing and managing your data

Internet of Things

- How are day-to-day lives will be connected and digitized
- What is this software doing?
- What is it collecting?
- What devices are you using? How is that used? E.g. placing an order for food having dedicated what you low on in your fridge.
- *Behaviour* becomes available in digital form, not just the data itself.

AI, Machine Learning, MI

- Automated processing of data and using that to make decisions

Summary

- Its all about integration of Information (data), People and Process
- Stakeholder hold engagement
- Culture (Digitalization)
- Start Small first then Scale
- Agile (Iterate -> Scope, Define , Develop, evaluate)
- Leverage whats out there (e.g cloud, Open source)

Extra Resources and Reading

- [Catalyst Introduction to Service Design](#)
- [Cast: Digital Agency](#)
- [Charity Digital](#)
- [Consequence Scanning](#)
- [Catalyst: Charities going Digital Case Studies](#)
- [Catalyst: Digital Resources](#)
- [Agile Project Management](#)