



# Digital Transformation

Learn the five phases to a digital workplace  
and how your organization can benefit.



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## Phase 1: Digital Transformation, What the Heck is it?

The term 'Digital Transformation' is being thrown around by software giants such as Microsoft, Adobe, and IBM. But what does it mean? Isn't everything already digital these days? It's not about a single digital file; it's about transforming how your business generates, stores and processes data today and in the future. Still not quite sure how this affects you?

We're doing a five-part series to lay out a roadmap for digital transformation – the future of business operations. See where you are in the process and what improvements you can incorporate, so you're working more efficient and growing your business.

Phase 1 begins with digitizing documents. You're creating an electronic file cabinet and eliminating all those banker boxes and metal file cabinets full of historical and current documents. The focus is reducing paper, reducing storage costs, and reducing the risk of information loss. Here in Central Oregon, we had a rough winter. With record snowfall, many businesses across town suffered from collapsed roofs. I heard horror stories of companies losing years' worth of information stored in file cabinets. Since they weren't able to access the information digitally, it also hindered their business operations.



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There are many key benefits any organization will realize from eliminating paper...quickly accessing information, freeing up office square footage (which we know isn't cheap these days!), and building a digital foundation.

Has your company completed the first phase of the digital transformation model?



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## Phase 2: Digital Transformation – Let's Get Organized!

To the tune of Olivia Newton-John's let's get physical: Let's get organized, organized; I want to get organized...Okay, now that you have visuals of leotards and headbands let's talk digital transformation.

In part 1 I discussed the first phase of digital transformation – digitizing documents. All your historical and current documents are all digital. You may still have paper processes, but you're scanning the papers at the end of your process. This is great but how do you organize and access the information? Did you know the average office employee spends at least 1.5 hours a day looking for stuff? Say your office assistant makes \$15/hr. They may be spending almost \$6,000 a year just looking for documents. Multiply that by all your staff. The moral of the math problem? Being unorganized is expensive.

That brings us to phase two of the digital transformation – organizing your documents. This phase is all about creating efficiencies. Being able to find information efficiently is challenging for many organizations. During this phase, we're adding metadata (think keywords) to documents making them easy to search, share, and organize – without sacrificing security.



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Digitize  
Documents



Organize  
Content



Automate  
Processes



Streamline  
Processes



Transform  
Processes



There are many rewards to organizing your documents from minimizing data entry and redundancies to increasing collaboration and adding security.

Has your company completed the first and second phases of the digital transformation model?



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## Phase 3: Digital Transformation – Forms are the Future!

Did you know implementing workflow automation could save your company 20-30% in efficiencies? Welcome to phase three of the digital transformation model – automating your processes. At this point your documents are digitized (phase 1) and organized (phase 2), now it's time to automate. Automation comes in all shapes and sizes. It's taking manual processes and making them automatic. To go fully digital and realized digital transformation, you have to digitize the processes that generate the paper. From initial information capture to routing, review, and approval, all the way through integrating with your business applications and keeping an audit trail and securely retaining information according to records retention policies.

Not sure what in your company can be automated? First, ask your employees what their most tedious tasks and processes are. Next ask your clients, customers, and users what brings them frustration in your process. This is your list of potential areas for automation.



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There are numerous reasons and benefits to implement workflow automation...increased productivity by elimination of manual tasks, money saved by reducing human errors and using fewer resources, and improved customer service by having accessible information. One of the top reason, I think, is employee happiness. Change can be hard on staff but eliminating tedious tasks will bring so much satisfaction to your employees you'll be amazed!

Has your company completed the first (digitize), second (organize), and third (automate) phases of the digital transformation model?



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## Phase 4: Digital Transformation – Get Your Streamline On!

Do you want to gain more visibility into your operations and increase the efficiency of cross-functional processes? Say, what? Yes, we're getting digitally deep here. Your documents are digitized (phase 1), organized (phase 2), automated (phase 3) and now you're about to get streamlined – the fourth phase of the digital transformation model.

Once you have reached this phase, you've automated your processes. Now you're able to keep track of who's doing what, what's happening when, and where events are occurring. But are you able to understand the performance? Do you know if one staff member has too much to do, and one too little? Do you know if there are bottlenecks, and if so, what they are and how to remove them? If you looked at your process, could you quickly identify areas for improvement?



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**“Armed with this information, you can make informed decisions to drive business innovation...”**

This phase – streamline processes – is all about refining automated processes, using data to inform business decisions, and ensuring efficiency in your business processes. Armed with this information, you can make informed decisions to drive business innovation throughout your business processes and better focus on what your organization does best.

Has your company completed the first (digitize), second (organize), third (automate), and fourth (streamline) phases of the digital transformation model? If yes, you’re an amazing rockstar!



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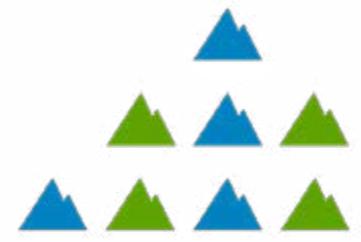


## Phase 5: Digital Transformation – Innovators Don't Stop Innovating

“There’s a way to do it better – find it.” Said the elusive Thomas Edison. That is what digital transformation is about. Continuous improvement. You’ve gone completely paperless and automated through digitizing your documents (phase 1), organizing your content (phase 2), automating your processes (phase 3), and streamlining your business operations (phase 4). What could be left? I’ll tell you. Phase five – transforming your processes to drive innovation by leveraging analytics. Yep, Big Data!

In this phase, you’re using analytics and insight to discover your problems and what’s holding your company back, or what could be holding you back tomorrow. You’re continuing to streamline your processes with changing ideas and technology. This is the phase of your journey where you embrace the digital workplace and find new ways to strengthen it. Congratulations!

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TRANSFORMATION PATH!



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