



Digital Strategy Roadmaps

A STEP-BY-STEP
APPROACH TO SUCCESS

AN
ENGINESS
BUSINESS GUIDE

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Introduction

Digital transformation is a big complex journey. Preparing for large scale digital transformation requires a healthy amount of planning. A digital strategy roadmap is a planning document that outlines what goals your organization is trying to achieve with (new) technology, and what digital initiatives need the undertaking to achieve your objectives.

Roadmaps can take on a variety of “flavours”, formats and styles. They may be broad or detailed. The context of your roadmap plan may be a project, product, business, technology, marketing, or even sales.

At Enginess, we approach digital strategy as a blend of business, technology and product design; hence, a digital strategy roadmap is a consolidated strategic plan that takes into account all three.

Simone Abel, Director of Digital Strategy at Enginess, shares her expertise on the process behind creating a digital strategy roadmap as it relates to achieving digital transformation. In this ebook, we are going to cover:

- Digital Strategy Roadmap Foundations
- Five Key Stages in Building a Digital Strategy Roadmap
- End Deliverable
- Why Bother?

About Us

Enginess is a Toronto-based digital consultancy. We empower businesses to get the most out of technology.

We shape strategies for business processes and deliver solutions that enhance customers' experience, improve efficiencies, generate new market opportunities, and redefine value creation for many different kinds of organizations.

We offer services that include:

- Technology Procurement
- Digital Business Strategy
- Revenue Growth Strategies
- Website, eCommerce and Custom Software Development
- Experience Design

Over the past 18 years, we've built a solid reputation based on our ability to consistently deliver high-quality customer service and handle complex digital strategy and development assignments.

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01 Foundations

A well-designed digital strategy roadmap defines a vision for digital transformation by articulating a clear understanding of where you are today, where you want to be tomorrow, and how you are going to get there. It visualizes the future of a product or service (while taking into account values, objectives, limitations and opportunities) into a picture that shows both current and future state. It is the crossroads between business and technology strategy and often, product strategy as well.

The following multidisciplinary activities combine together to produce a digital strategy roadmap:

- Design Thinking (Service Design & User Experience Design)
- Research (UX, Competitor, Analytics, Marketing)
- Business Analysis
- Technology Analysis (Assessment, Solution Architecture, Procurement...)
- Content Strategy (Content Analysis & Information Architecture)
- Project / Product Management (Timelines, Budgets, Resourcing...)

Security, legal, privacy and accessibility expertise may also be in the mix. Depending on the nature of the endeavour, you'll need to make sure you have the right people with the right skill sets and competencies contributing at the right time. Working with an expert or team of experts with senior level of knowledge and experience is essential.

02 Five Key Stages in Building a Digital Strategy Roadmap

Stage 1: Evaluate your current state and gather objectives

The first step is to evaluate and document your current state and gather objectives against the problems that are experienced, felt or foreseen today. In this stage you are asking:

“How does the process / service / system work today?”

“What’s not working so well?”

“How do we want this to work better?”

The current state evaluation forms the basis for your future state recommendation and roadmap. It is all about building the business case for the future plan and setting up realistic expectations around the execution of that plan. In no particular order, the following kinds of activities are typically undertaken:

- Discovery with business owners and customers to identify sets of problems and objectives
- Study and/or audit of existing systems, technology, and processes
- Review of existing analytics and performance metrics

When an evaluation is done thoroughly, you can feel confident that you have identified all the existing “moving parts”. Knowing the whole picture, you’ll be able to start linking vision and objectives to concrete initiatives.

Stage 2: Vision a future state based on business and user objectives

Next, define the future state through problem-solving against key objectives. Aim for a well-rounded picture that is well balanced and not just the view or opinion of a single business owner or individual.

Business Stakeholders

The first step is to identify and gather objectives from your business stakeholders. The aim is to understand the high-level “desired and required” requirements for the organization as a whole.



End users

The second step is to gather objectives from your end-users. By now, you should have a good idea of what the organization feels is a need or priority. Talking to customer end-users about what they want and need may give you a slightly different result.

Business stakeholders and end-users represent two sides of the same coin. Both sets of feedback should add up. Combined with earlier steps and you have a complete vision of what your digital strategy roadmap needs to deliver. Depending on the complexity of the transformation, the task may take more or less time, be more or less complex with more or fewer groups of stakeholders and end users to solicit input from. In the end, you are looking for insights that support your future vision. It can be as simple as saying: “This digital project is going to have a positive impact on X business goal.”

Stage 3: Bring together the objectives and the initiatives

Now that you know what your current and future states are, you need to link all you have learned so far to initiatives (things to action) that meet the objectives AND capabilities of the business.

The complexity of this stage is often underestimated or skipped altogether.

It is assumed that a digital project will magically drive an organization’s objectives, but that is not always the case. The right technology will drive business objectives only if the business **can and will** support the change(s) you are proposing.

- Who is responsible, accountable, or otherwise involved?
- Who is championing the project? Who can make directional decisions?
- Who will be impacted by the changes proposed?
- What factors need to be considered to ensure the change is accepted and successful?

When you are building your digital strategy roadmap, you need to consciously link it back to the business’ goals and objectives and consider feasibility and viability (capability). Capability is an important factor that will influence your sequencing and prioritization of discrete initiatives within your strategic plan.

New to digital strategy roadmaps?

Use our downloadable digital roadmap template to get started!



The image shows a screenshot of a digital roadmap template spreadsheet. At the top left, the logo 'ENGINESS The Enterprise, Futured.' is visible. The main title of the spreadsheet is 'Digital Roadmap'. The spreadsheet has several columns: Initiative No., Initiative, Description, Goal, Current State, Requirements, Dependencies, Success Metrics, Department, Resourcing, and Budget. A single row of data is filled in, with the following content: Initiative No. '1', Initiative 'Change 1 - New Roadmap by July', Description 'The current roadmap will be replaced by a new one', Goal 'Increased customer loyalty', Current State 'The customer isn't using mobile', Requirements 'Mobile QR, App and Web 2.0 functionality', Dependencies 'CRM, ERP, HR', Success Metrics 'NPS', Department 'HR & IT', Resourcing 'Digital Strategy', and Budget 'None'. The rest of the spreadsheet is empty.

DOWNLOAD THE TEMPLATE

Stage 4: Synthesis

Once you have got your requirements, objectives, and initiatives in place, it is time to map it out. Your map can be visual, textual, or something in between.

You will need to organize everything you have gathered into a single communication that is easy to read and understand. This might look like a simple side-by-side comparison; a spreadsheet list; a table or chart; or a visual diagram. Regardless of format, your digital strategy roadmap is a summary of:

- What the current state is
- What the future state could / should / must be
- What business objective(s) you are hoping to achieve
- What the needs of stakeholders and end-users are and how to solve for them

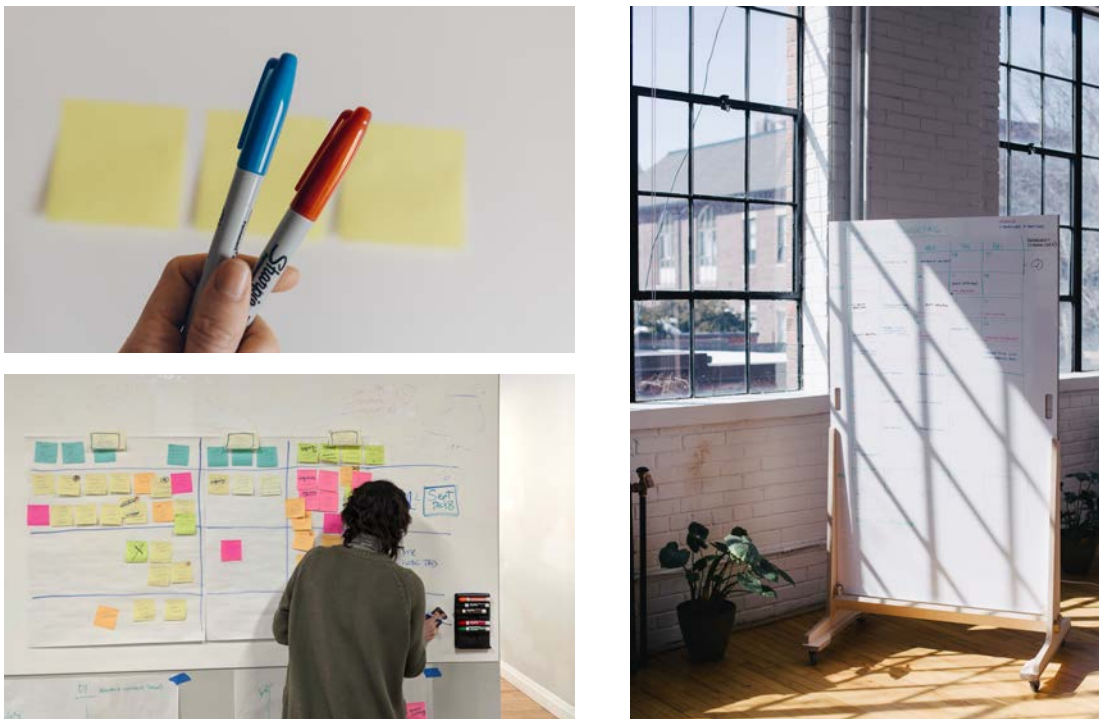


Figure 1: You can organize your roadmap in Scrum board fashion the old fashioned way, or with software in a variety of different ways (Excel, Word, card sort software, scrum software, swim lane diagram, mind map, flow diagram, etc). It should be simple enough to be understood by technical and non-technical audiences.

Phase 1	Phase 2	Phase 3+
1. Multi-domain CMS	1. CRM procurement	1. Extended membership features
2. Brand identity	2. CMS / CRM integration	2. Awards management
3. Content strategy	3. Member portal content strategy	3. Continuing Education platform
4. SSO		4. Awards API
5. Blog re-tool		

Figure 2: A very simple roadmap depicting phases and initiatives in a table.

Stage 5: Roadmap

Finally, stage five – putting it all together into a step by step plan to execute.

Sort / Weight Priorities

Assigning priority to your initiatives can be complicated. There are many prioritization methods that can help with sorting. A simplified version of the MoSCoW method usually works well if your group of stakeholders is on the smaller side: Must, Should, Could, Won't Do.

You can also try Now, Later, Not Doing. Or a basic priority numbering system: 1, 2, 3.

Dependencies

There are often dependencies within complex projects. If these go undocumented, then it's easy for projects to stall or become derailed. A detailed, prioritized roadmap enables your team to work in the smartest possible way while delivering the future state. An e-commerce experience cannot be redesigned until the inventory management database is updated with additional product attributes. Clean data is a dependency on an optimal front-end experience.

Sequencing

What must be done in “waterfall” style and what can be done concurrently, in dual track, or agile? Sequencing is all about assigning your initiatives to a viable order of execution.



FREE TEMPLATE

Digital Strategy
Roadmapping Tool

[DOWNLOAD THE TEMPLATE](#)

03 End Deliverable

So what does a digital strategy roadmap actually look like? It can take a variety of forms, be short or long, but ours is a document that contains the following basic structure:

1. Background Goals & Objectives
2. Current State vs. Proposed Future State
3. Roadmap Plan

Background Goals & Objectives

Start by reminding everyone what problems you are aiming to solve. Why are we here? Recap the broad vision of what you are trying to achieve, the core objectives that need to be met, and some background context on the current state.

Key parts to include:

- Problem Statements: Why are we doing this?
- Key Objectives: The vision you are building towards
- Research Insights
- Solution Outcomes and Roadmap Initiatives

Current “Before” State vs. Future “After” State

Next, you need to illustrate the plan that you are proposing. This is where diagrams, tables, and charts are especially useful as they help everyone understand where you are right now and where you are going.

For the current “before” state, your assessment needs to communicate all the different components currently involved in the process / system / service. This includes all the features and existing functions, plus how those features and functions work together and/or connect in the context of the broad system or organization.

For example, if you are building a digital strategy for your organization’s web presence, your current state would likely cover:

- Existing tools and platforms (e.g. CMS, CRM, a marketing automation tool, eCommerce, etc.)
- Existing integrations with third-party platforms or systems (e.g. social media platforms)
- Any automation or additional channels that piggyback off the site (e.g. a newsletter)
- Possibly departments or third party vendors who are responsible

You would need to think about all the content, where it comes from, where it goes to, and what is holistically being produced.

For your future “after” state, you will need to include the components you are keeping, re-organizing, and adding to show how objectives will be met. If you are redesigning a website and adding in some marketing automation, e-commerce, or a mobile app, you would include that process / system or service within the ecosystem of connections.

At this stage, both current and future states represent “zoomed out” views, and look at the broader system as a whole.

Below are a couple of examples of a current vs. future state for a website technology ecosystem, in relatively simple visual form.

Example #1 - Before

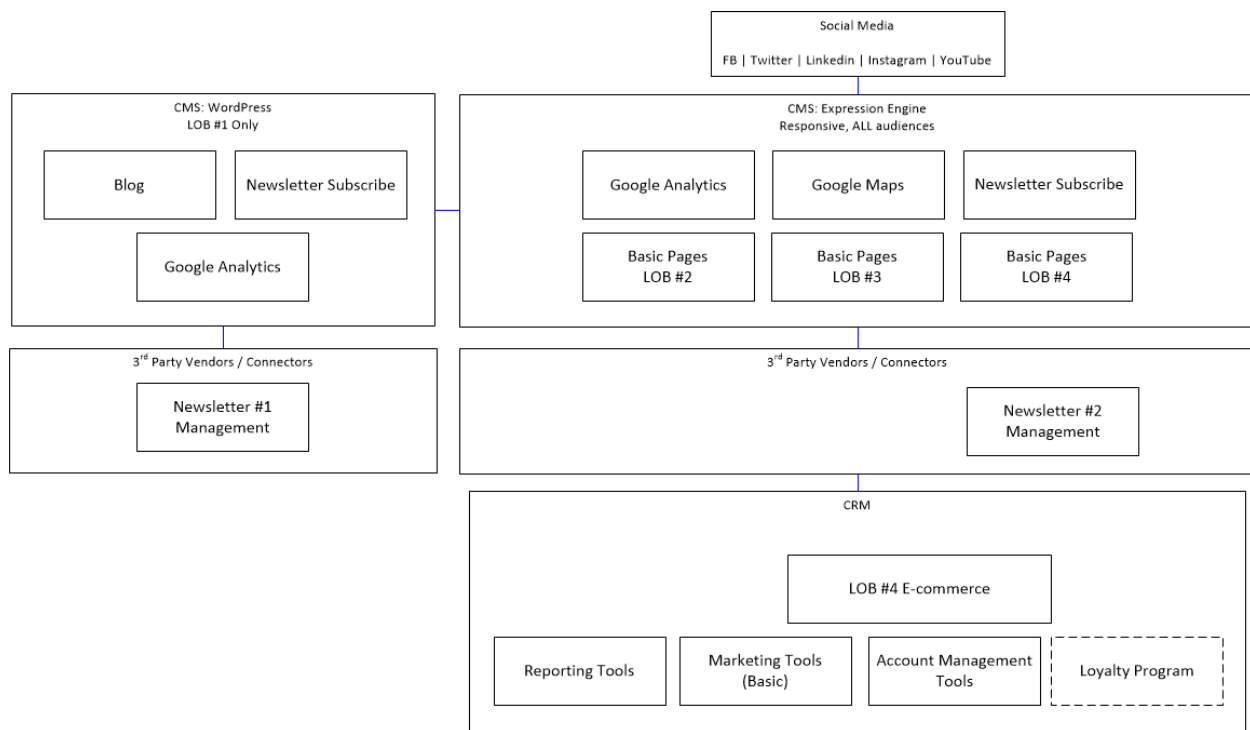


Figure 3: Here we see a digital ecosystem that is fractured and divided between two incompatible CMS systems, connected to separate marketing tools and customer databases. The business is unable to centralize data or derive cohesive analytics insights.

Example #1 - After

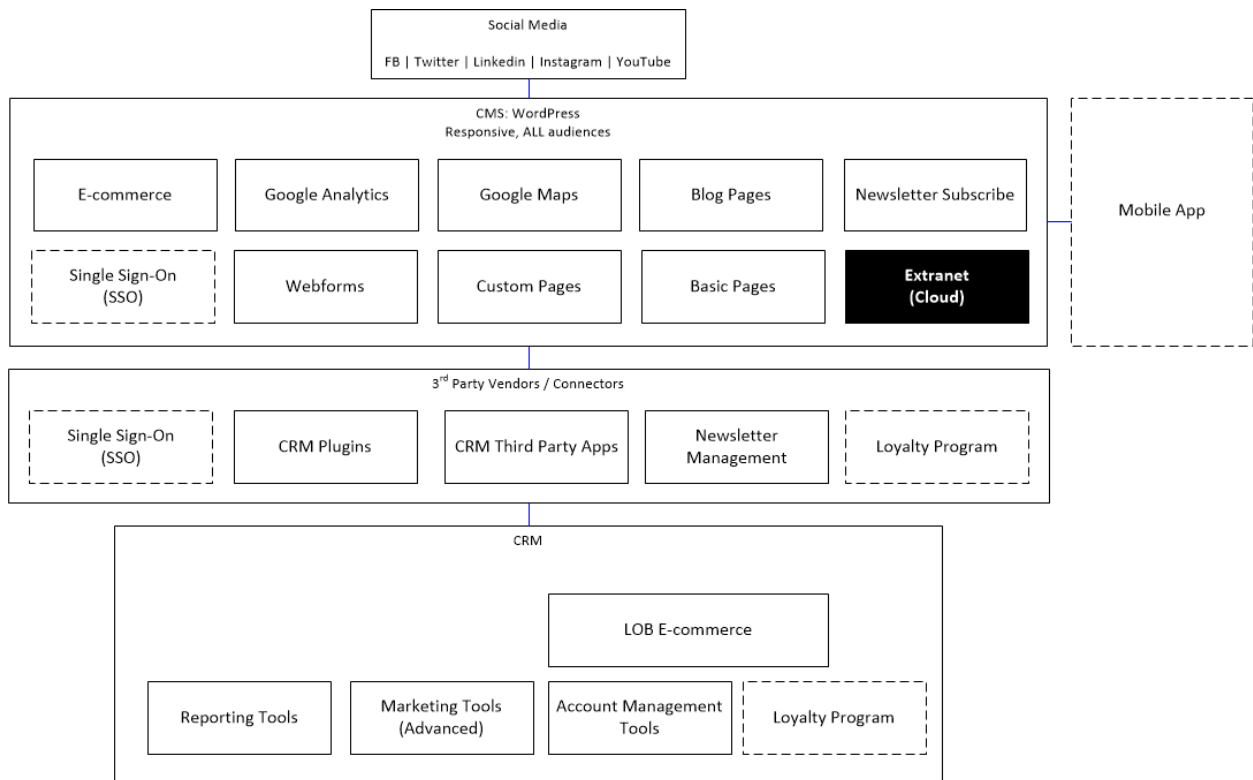


Figure 4: In the reorganization, we see a cohesive migration to a single scalable content platform that can better support a multitude of other connections.

Example #2 - Before

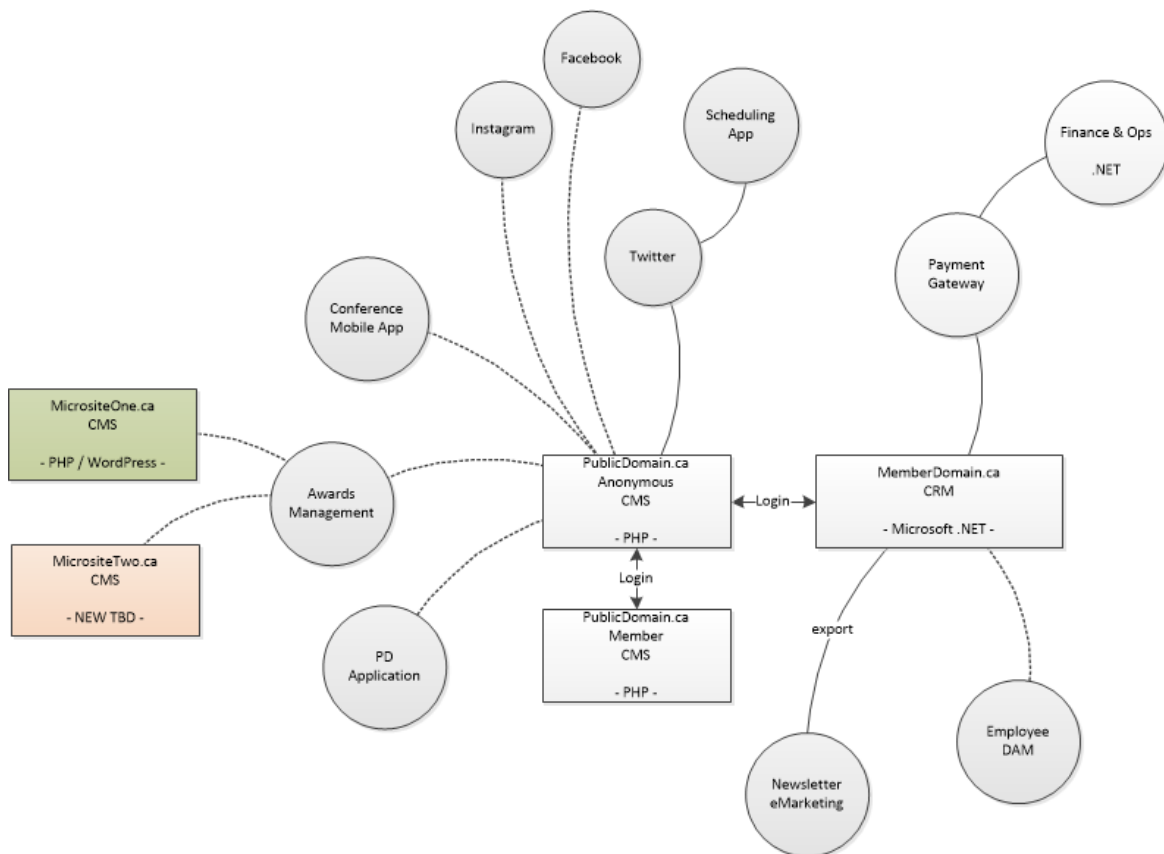


Figure 5: Five domains all managed separately resulting in a lot of manual duplication and operational inefficiency.

Example #2 - After

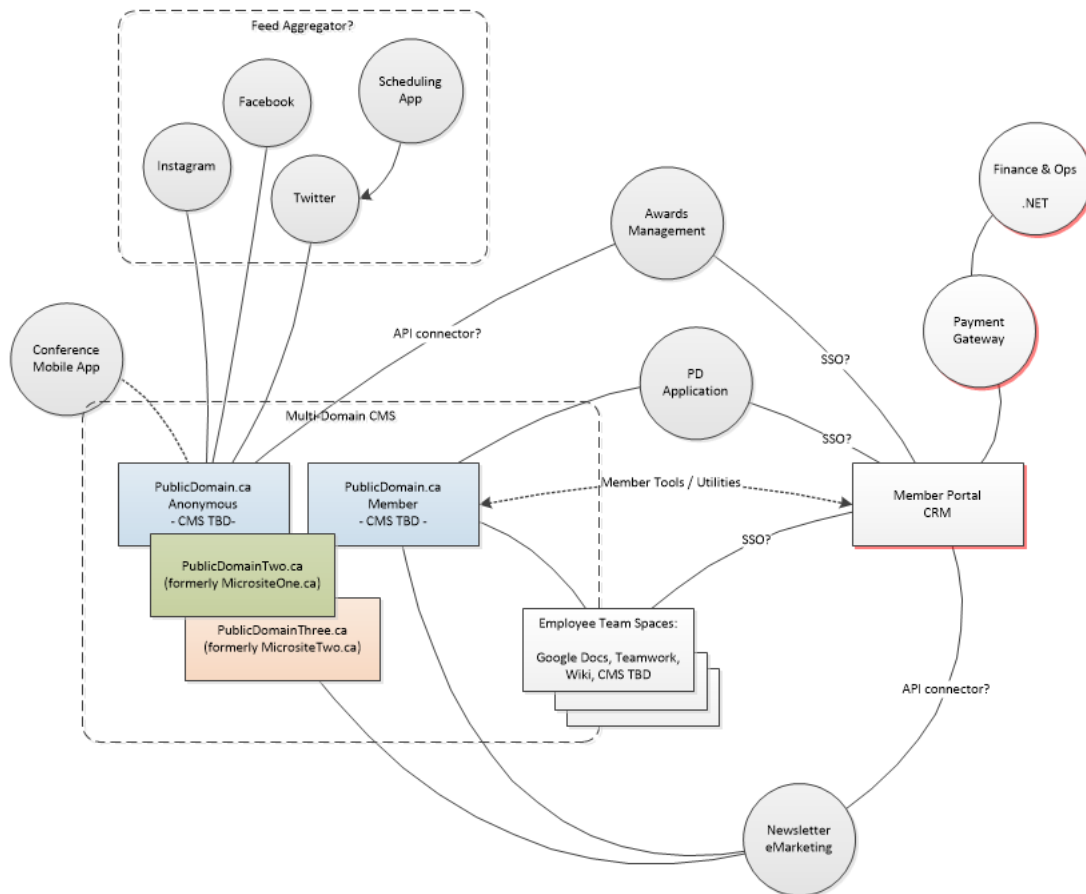


Figure 6: A cohesive, multi-domain management system where content can be automated and shared between domains serving different audiences.

Roadmap Plan

The last component is the supporting detail and description of the roadmap plan itself. Include a thorough explanation of each initiative and strategy around how you are going to achieve it.

Add charts, documentation, or data that supports your definition of current and future state. Here, ideally, you want to include your KPIs and success metrics as well as intended outcomes. This helps with optimization, enabling measurement against benchmarks and supporting decisions to pivot.

Now vs. Later vs. Not Doing

What is the most important piece(s) you need to work on to realize your business objectives? What is/are less important piece(s) of the future state? What can't or won't be done at all?

Describe your initiatives and outline the level of impact (high, medium or low) and any relevant dependencies or considerations. Gauge by:

Cost

Let's say your digital strategy realizes a new CMS and CRM is required, but there isn't budget for both. Your roadmap may need to consider how to roll-out a new CRM first with a temporary CMS solution, secure more budget in a future phase, then continue on to long-term CMS solution.

Level of Effort

Consider the level of effort required. How long and how many resources will each discrete initiative take? What is needed in terms of internal or external resources? Level of effort pertains to cost, resourcing and timeline.

Timeline

How long will each initiative take? What are the milestones, what order or sequence should they take, and (roughly) when do you expect completion?

When moving to the activity schedule, it is essential to identify the predecessors and dependencies. For example, you can't migrate to a new database before you have gone through the database selection process. In this case, the "selection process" will be the predecessor to "database migration". This needs to be included in your roadmap plan.

04 Why Bother?

A digital strategy roadmap is a cohesive planning document that joins digital transformation projects and initiatives to short and long-term goals pragmatically.

Digital strategy roadmaps benefit your business because they:

- Help **communicate a digital transformation product or service strategy** that supports a set of business and end-user objectives
- Clarify **differences between current and future state**
- Establish a high-level **order of execution, priority, and sequence with a potential timeline** to undertake the work
- Provide a way to **achieve executive buy-in on technology projects** before a line of code is written or software is purchased.

Together, these combined benefits reduce digital project risk and increase ROI.

Digital strategy roadmapping is all about proper planning, and mitigating risk against bad (rushed) technology decisions. It's also about getting buy-in from executive stakeholders and ensuring there is alignment to broader organizational strategic goals and plans. Who benefits ultimately? Your end-users - whether they be your staff or customers - and the business itself - through increased operational efficiency and/or data optimization.

05 Final Thoughts

The roadmap is the outcome of an important planning exercise that helps key stakeholders in your business understand what the existing process, systems and services are, what the future could be, and how to get there.

A digital strategy roadmap, combined with research, visualizations and performance goals, is a powerful way to tell the story of digital transformation. Beyond keeping everyone in the team aligned, the vision-objective keeps different teams with competing agendas moving in the same direction.

Given how quickly the needs of your customers and business will change, it is important to revisit your digital strategy roadmap continuously. In future articles, we plan to share more on related topics such as:

- The Discovery Process
- Audits & Expert Reviews
- Gathering Objectives
- Prioritization Methods
- Technology Procurement
- Continuous Improvement / Optimization

Happy roadmapping!

Need help with your digital roadmap?

If you have any questions about your digital strategy roadmap, get in touch with us using the contact information below.

We'd love to hear from you.

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