



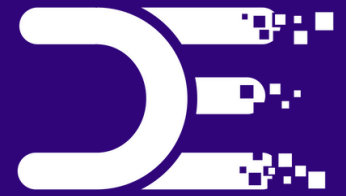
**DatumEvolve**

**A PRACTICAL GUIDE TO  
DIGITAL  
TRANSFORMATION**

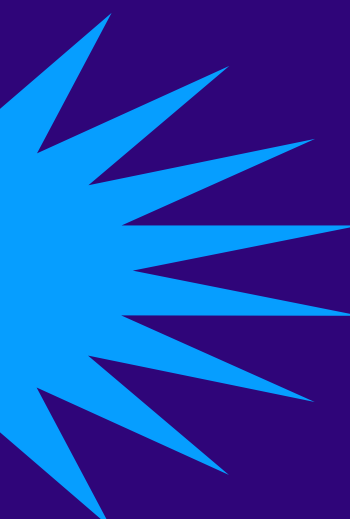


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# WHAT DOES DIGITAL TRANSFORMATION REALLY MEAN?



In recent times, the phrase "digital transformation" has become ubiquitous, contributing to a considerable amount of confusion regarding its meaning and implications. In essence, digital transformation signifies more than just a trendy buzzword; it encapsulates the comprehensive modernization of business processes. This involves the deliberate adoption of new technologies, methodologies, and strategies to replace manual, paper-based and asynchronous business processes with modern, cloud-enabled digital processes. This allows businesses to align with the dynamic digital landscape and meet the ever-evolving expectations of consumers.

At its core, digital transformation is a strategic initiative that goes beyond surface-level changes. It delves into the fundamental restructuring of how businesses operate, leveraging innovative solutions to enhance efficiency, customer engagement, and overall adaptability. It's not merely about putting services online or upgrading legacy systems; instead, it encompasses a holistic approach to revamp internal systems, optimize operations, and create a digital-first mindset across all facets of an enterprise.

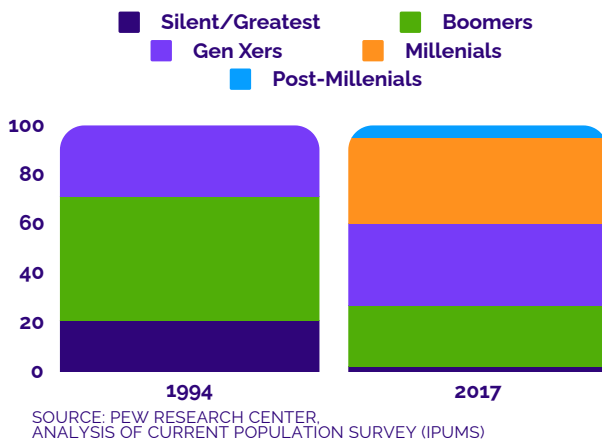
Digital Transformation reflects a proactive response to the challenges posed by the rapidly changing technological environment, acknowledging that staying competitive requires continuous evolution. It's about leading the way by embracing novel digital tools that connect siloed data and systems, reimagining business processes to leverage automation, and perhaps most importantly, fostering an internal business culture of innovation.

**Businesses must strive not only to meet current consumer expectations but also to anticipate and adapt to future shifts in the digital landscape.**



# WHY IS DIGITAL TRANSFORMATION SO IMPORTANT?

In today's ever-changing landscape, organizations must foster greater agility to stay competitive and innovative. Technological advancements are not going to slow down, and younger generations have proven to be more technologically adept and willing to embrace change on a much faster timeline. As these younger generations take on more economic influence around the globe their expectations as workers and consumers will likely only accelerate this change.



This is becoming more and more evident as workforces now seek the flexibility to work in ways that suit them best, whether it's through hybrid models, collaborative work, iterative management, or Lean-Agile delivery. Unfortunately, many enterprises struggle with rigidity in their processes and information management, leading to limited visibility into their operations processes and siloed data.

To address this, businesses must evolve to not only support diverse work methodologies but also centralize efforts and unite teams around shared goals. It's a shift from rigid structures to a more dynamic approach, allowing teams to deliver on strategy while accommodating various work preferences. "Work" is now multidimensional, with highly distributed teams becoming the norm integrating both remote and onsite employees, requiring leaders to establish necessary guardrails while empowering teams to choose how they work and execute tasks autonomously.

## 10 Benefits of Digital Transformation

**1. Speed and Agility:** Quickly adapt to industry and tech shifts, minimizing disruptions to keep your business agile and responsive.

**2. Enhanced Compliance and Security:** Automated tools ensure compliance with regulations and fortify security measures, safeguarding your operations.

**3. Elevated Employee Experiences:** Empower your workforce with meaningful and valuable work experiences, enhancing overall employee satisfaction.

**4. Streamlined Efficiency Boost:** Bid farewell to process bottlenecks as automated workflows supercharge efficiency, streamlining your operations.

**5. Informed Decision-Making:** Make lightning-fast, well-informed decisions by tapping into insights derived from up-to-date information.

**6. Anytime, Anywhere Access:** Access digital processes seamlessly from connected devices, making work accessible from any location at any time.

**7. Improved Customer Experiences:** Optimize tools and platforms for a customer-centric experience tailored to meet user needs, elevating customer satisfaction.

**8. Centralized Data:** Create a system of truth by pooling customer information, market intelligence, and digitized content in one centralized hub for easy access and analysis.

**9. Transparency and Collaboration:** Break down information silos across the enterprise, fostering transparency and collaboration among teams.

**10. Increased Profitability:** Watch profits soar as productivity, smart decision-making, and customer appreciation take center stage in your digital journey.



# THE TOOLS AND FUNCTIONALITY FUELING MODERNIZATION

For businesses aiming for effective digital transformation, the key lies in a carefully curated blend of cutting-edge technologies. These tools can act as a compass for a digital journey tailored to the unique needs of your organization, ensuring a seamless transformation with enhanced efficiency and security.

## **CONTENT CAPTURE**

Content drives businesses. Gain control over incoming information, regardless of its origin or format. Capture content where it originates and organize it seamlessly into a single centralized system of truth

## **CLOUD COMPUTING**

Ensure secure and scalable access to essential information, anytime and anywhere. Cloud solutions offer benefits crucial to digital transformation, such as disaster recovery, cost savings, and expert access.

## **ARTIFICIAL INTELLIGENCE (AI)**

Leverage AI, including machine learning and data analytics, to elevate organizational productivity and uncover valuable insights for strategic decision-making.

## **CUSTOMER COMMUNICATION MANAGEMENT**

Elevate the customer experience with powerful tools for seamless omnichannel communication.

## **INTELLIGENT ENTERPRISE SEARCH**

Quickly locate precise information within your vast content volume. Access cross-system results seamlessly with high-powered and intuitive enterprise search capabilities.

## **COLLABORATION**

Foster sharing and collaboration without compromising control. Implement secure and user-friendly ways to share information.

## **CONTENT MANAGEMENT**

Simplify organization-wide content and digital asset management. Keep information accessible and well-organized, allowing users to focus on their tasks instead of grappling with folders and files.

## **PROCESS AUTOMATION**

Enhance business processes intelligently with tools like intelligent document processing and robotic process automation. Optimize structured processes while handling exceptions efficiently.

## **CASE MANAGEMENT**

Enhance business processes intelligently with tools like intelligent document processing and robotic process automation. Optimize structured processes while handling exceptions efficiently.

## **SECURE INFORMATION GOVERNANCE**

Enhance business processes intelligently with tools like intelligent document processing and robotic process automation. Optimize structured processes while handling exceptions efficiently.

## **REPORTING & ANALYTICS**

Utilize a unified platform to manage data relationships, documents, and processes. Support dynamic real-world operations with robust reporting and analytics.



# EMBRACING DIGITAL TRANSFORMATION

Digital Transformation is an ongoing commitment, not a destination. Like staying physically fit, it's a perpetual evolution, adapting to the changing tech landscape. Think of it as a constant dance, learning new steps, experimenting with solutions, and overcoming challenges. Tailor this journey to your organization's unique needs, focusing on people and processes.

While many claim the dance starts with technology, it truly begins with people. Businesses are not the tools, systems or processes in use; they're made up of people who use the tools and systems and follow processes to complete work. People play a pivotal role in the success or failure of transformation efforts.

## KEY CONSIDERATIONS

### **THE HUMAN ELEMENT**

The most successful modernization efforts begin with departmental or process specific initiative. Treat the effort the way you might approach a home renovation. If you intend to continue living in the home (ie. Continue to conduct business), you would not take on all the improvement efforts simultaneously but would rather strategically address them room by room (department by department). This gives you several advantages including the ability to effectively measure the impact of change and apply lessons learned in the process to the next departmental initiative.

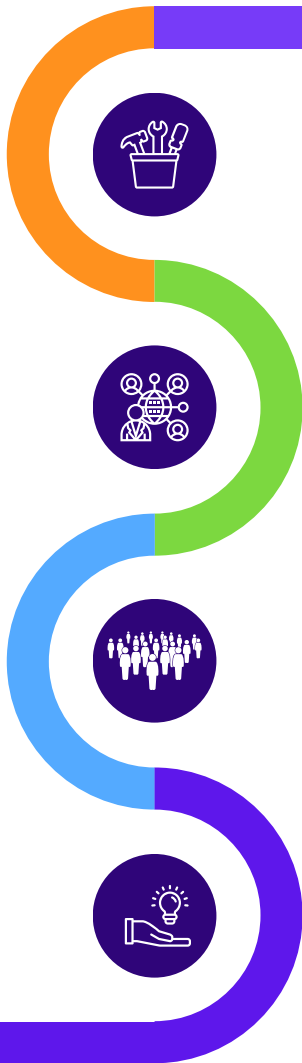
These efforts require collaboration at all levels, from front-line workers to the executive suite. Digital transformation flourishes in organizations that prioritize modernization, embrace mistakes as catalysts for growth, and demonstrate unwavering commitment from top to bottom. As a result leadership plays a key role in this dance, preparing the workforce for changes by communicating how roles will evolve and emphasizing the value employees bring to the organization. This engagement at all levels not only creates an alignment in goals for the organization but is necessary to shift the perspective of impacted workers from being one of reluctance to change, to one of excitement for the future.

### **TECHNOLOGY INTRODUCTION**

Secondary to the human element and yet equally important is the introduction of new technology. Establishing a clear roadmap for improvement and carefully selecting the appropriate technology to leverage will enhance both customer and employee experiences. Whether it's streamlining processes through digital intake forms or automating entire workflows, technology is the rhythm that propels the financial services sector into a future of efficiency and improved interactions.

# THE 4 MAIN AREAS OF DIGITAL TRANSFORMATION

Digital transformation relies on the support of cutting-edge technologies, but it's not just about the tools. A genuine digital transformation encompasses four key areas within an organization: Tools, Processes, People, and Offerings.



## TOOLS

01

Updated tools, in the form of new solutions and advanced technology implementations, are applied to old processes and able to complete them more quickly and accurately than when it was paper-based and/or manual. In some cases, the technology render some processes redundant and unnecessary.

## PROCESSES

02

Entire business processes can be automated with a digital transformation strategy. While these changes can drive efficiencies in workflows, they can sometimes also impact the work that people do within the organization. Organizations need to consider how their digital transformations will modify all aspects of their operations, organizational structures and budget allocation.

## PEOPLE

03

Experts predict that Digital Transformation efforts will result in net job creation. Leadership can prepare their workforces for the changes digital transformation will bring to the workplace by understanding and communicating how employees' time will be reallocated and what new value their contributions will bring to the organization.

## OFFERINGS

04

The benefits of digital transformation mean little if organizations don't use their newfound time and human capital to improve the products, services and experiences they offer employees, partners and customers. The intent of digital transformation is to provide humans with the freedom to perform uniquely human tasks, like creative problem solving, developing new ways of connecting with the people they serve, and bringing innovative new offerings to market.

# HOW TO GET STARTED

The most successful modernization efforts begin with a departmental or process specific initiative. Treat the effort the way you might approach a home renovation. If you intend to continue living in the home (ie. Continue to conduct business), you would not take on all the improvement efforts simultaneously but would rather strategically address them room by room (department by department). This gives you several advantages including the ability to effectively measure the impact of change and apply lessons learned in the process to the next departmental initiative.

To make your digital transformation journey a triumph, you must embrace a holistic approach to streamline how information and content flow across your organization. Even the most groundbreaking technologies won't make a significant impact without the support of a strategy focused on outcomes and an organizational culture that is prepared to embrace change. It's more than just another IT project, true success lies in transforming how information is managed, shared and leveraged throughout your organization and business processes.



## 01

### **IDENTIFY THE MAIN BUSINESS CHALLENGE**

Pinpoint the primary problem your organization needs to solve, whether it's addressing customer friction or enhancing a specific aspect of your product or service.



## 02

### **DEFINE A CLEAR VALUE PROPOSITION**

Go beyond wanting to "make things better." Determine how much improvement is needed, and envision what success looks like for a clear value proposition. Be careful to avoid framing the symptoms of inefficiency as the issue to address, but rather look for the systemic causes.





## 03

### EXAMINE CURRENT PROCESSES

Identify processes that contribute to the persisting problem. These are the ones you'll likely need to revamp with the support of transformative technologies. Involve knowledge workers and explore the processes thoroughly with the goal of getting all the bigger questions addressed:

#### **What is the Current State of the Process?**

Assess the existing process to understand its strengths, weaknesses, bottlenecks, and inefficiencies.

**Who are the Stakeholders?** Identify all the individuals or departments involved in or affected by the process to ensure comprehensive input.

**What are the Key Metrics?** Determine measurable criteria to evaluate the success of the improved process, such as time, cost, quality, or customer satisfaction.

**Where are the Pain Points?** Identify specific areas of frustration, delays, or errors within the current process that need attention.

**Are There Compliance or Regulatory Requirements?** Ensure that any changes align with industry regulations, standards, or legal requirements.

**How Does Information Flow?** Map out how information travels through the process and identify points where it might be delayed or lost.

**What Technology is Currently in Use?** Evaluate existing tools and technologies supporting or interacting with the process.

**Who Performs Each Task?** Identify the individuals responsible for each step in the process to understand roles and responsibilities.

**What Feedback Exists?** Gather feedback from those directly involved in the process, as they often have valuable insights into improvement opportunities.

#### **Can Steps be Simplified or Eliminated?**

Evaluate each step in the process to identify areas where complexity can be reduced or unnecessary steps can be eliminated.

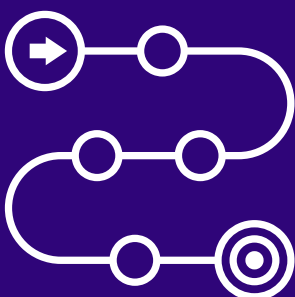
**Is Automation Feasible?** Consider whether certain tasks or elements of the process can be automated. For example, does the process require human decisions making, judgement, or approval?

#### **Will Changes Impact Other Processes?**

Analyze the potential ripple effects on interconnected processes to ensure improvements don't create issues elsewhere.

#### **What is the Cost-Benefit Analysis?**

Evaluate the expected costs of implementing changes against the anticipated benefits to determine the overall feasibility of improvement initiatives.



## 04

### CRAFT A USE CASE AND PROJECT PLAN

Create a plan for identifying use cases and executing projects. Involve a cross-departmental team, including leadership, IT, and relevant knowledge workers.



## 05

### IMPLEMENT CHANGE MANAGEMENT

Develop a change management plan for both internal and external stakeholders. Communicate changes to customers in advance, and address potential resistance from middle management early by highlighting the initiative's value.



## 06

### SCALE YOUR INITIATIVES

Plan ahead for scaling your digital transformation initiatives beyond the pilot phase. Leverage the momentum from the success of this initiative to drive additional transformations across the entire enterprise.



## 07

### GAUGE YOUR PROGRESS

As your digital transformation journey unfolds, gauging progress is crucial. Here's how you'll feel the impact as your organization reshapes itself:

#### 1. Content Takes the Lead

In the fully transformed state, content becomes self-propelled across the organization. Once captured in a central repository, it seamlessly navigates to the right personnel, no matter where they are. Specific business criteria automatically guide its journey. Technology should effortlessly handle predictable queries, such as document approvals or identifying related content.

#### 2. Content Communicates Proactively:

A significant milestone is when systems send notifications to the relevant staff or audience upon any changes, like form submissions. As individuals need to review or act on content, notifications guide them seamlessly. These notifications provide all necessary information, empowering users to complete tasks efficiently with access to related content.

#### 3. Content Evolves in Accessibility:

Simply having digital information doesn't equate to digital transformation. A true transformative process ensures accessibility and usability of information across formats and contexts. Unlike a static PDF, digitally transformed content is dynamic. It goes beyond mere storage, providing context and usability through innovative tools and easily find & share related content with colleagues. It allows you to extract and leverage data into subsequent processes and to generate additional content.

In essence, digital transformation is not just about the digitalization of content; it's about empowering content to navigate, communicate, and evolve in ways that enhance overall organizational efficiency and effectiveness.

# CHALLENGES

Embarking on digital transformation is an exciting journey, but it comes with its share of challenges. Here are some key hurdles to be mindful of, along with practical insights on how to address them:



## UNCLEAR VISION

A common stumbling block is the lack of a clear vision. To overcome this, ask tough questions during planning and implementation:

- Why are we undergoing this transformation?
- How will it reshape our business?
- What impact will it have on job roles and processes?
- What impact will it have on Customers and our engagement with them?



## OVERAMBITIOUS PACE

Trying to do too much, too fast is a common pitfall. Successful digital transformations often start small and gain momentum. Begin with initiatives that offer quick returns, such as:

- Implementing intelligent capture for paper-based processes
- Automating time-consuming manual steps in critical processes
- Introducing cloud-based document sharing for remote collaboration
- Early success and tangible benefits can garner stakeholder buy-in for broader transformation.



## CHAOTIC TRANSFORMATION APPROACH

A scattered, all-encompassing transformation can be disruptive. Focus on targeted changes to streamline and optimize specific processes prioritize efforts that will garner the highest benefit with the least disruption. Start with areas that can quickly showcase return on investment, paving the way for broader acceptance.



## FOCUSING ONLY ON TECHNOLOGY, AND NOT ON PEOPLE

Do not ignore the Human Element. Again, **DO NOT IGNORE THE HUMAN ELEMENT**. Far too often, "people" emerge as the primary roadblock to successful digital transformation. Organizations overcoming this challenge emphasize getting buy-in from all relevant players on the transformation strategy as the key to success. Recognizing the human aspect is crucial for a well-rounded and impactful transformation. It eliminates the barriers to adoption, and reinforces the cultural shift needed to embrace ongoing improvement and modernization.

# THANK YOU

We hope you've gained valuable insights into Digital Transformation. Remember that Digital Transformation is a continuous journey, and your commitment to learning is the key to success.

## NEXT STEPS

Take action now! Implement the tips you've learned to address your own modernization efforts.

## ADDITIONAL RESOURCES

Sign up for our monthly newsletter. You'll receive information related to Digital Transformation, new automation solutions, industry trends and thought leadership.

Visit our [Snack Bytes: OnBase Tips & Tricks](#) YouTube channel. If you are an existing OnBase user and are interested in learning practical Tips & Tricks to better leverage your system,

If you are a Credit Union utilizing OnBase consider joining our [FREE Credit Union OnBase Support Forum](#) on LinkedIn. We provide FREE Support and answers to your OnBase questions.

## ABOUT US

Datum Evolve is a nimble, Michigan-based consultancy providing expert OnBase development and Digital Transformation services, Our Mission is to empower companies to reach their modernization goals by providing innovative, human-centric, technology-focused solutions to their most pressing problems.

## STAY CONNECTED



If you would like to learn more about our organization and the services we provide, please contact us.



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