

The Guide to Building a Business Case for Digital Transformation

Taking your digital transformation from a strategy to a reality will likely require a well thought-out business case. This guide will lead you through the questions needed to outline a strong business case for transformation.

WHAT IS THE BUSINESS NEED AND VISION?

First things first, why is Digital Transformation important for your organization?

- What specific challenges are you trying to address?

- What impact will this project have on the larger organization?

- Which of the following will a transformation project help you accomplish?

- Increase Revenue - Example: Help customer service team identify opportunities with a complete view of information.
- Compress Product Development Lifecycle - Example: Shorten approval lifecycle by automating workflows and increasing visibility.
- Reduce Waste - Example: Increase productivity by reducing wasted time searching for information.
- Increase Compliance - Example: Use exception reports to identify if all required employee documents are included in a record.
- Increase Profitability - Example: Automate manual processes to complete them without human intervention.

- How does this project fit into the strategic priorities of the organization?

WHAT DOES THE CURRENT PROCESS LOOK LIKE?

Why is this specific department or process a good candidate for transformation?

- What opportunities are there to improve your current process?

- What gaps are driving the decisions for a change?

- What are the risks to continuing with the status quo?

NEXT: WHAT IS THE RECOMMENDED SOLUTION?

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This is where you have the opportunity to highlight your specific strategy. How can we solve the challenges outlined above?

- What options were evaluated?

- Why did you choose this specific strategy/solution?

- What partnerships or vendors are you recommending?

- What are the estimated:

Time Investment: _____

Cost for the Project: _____

- How will you evaluate success?

- What risks are there with moving forward with the project?

- How will you communicate and manage change internally?

WHO'S ON THE TEAM?

It is critical to understand who your project stakeholders are and obtain their buy-in early and often. Who will be involved in the project and what are their motivations for supporting the solution? What is in it for them?

- **Process and Subject Matter Experts:**

Who: _____

Expected Benefits: _____

- **Department Leaders:**

Who: _____

Expected Benefits: _____

- **Executive Sponsorship:**

Who: _____

Expected Benefits: _____

- What support is required to complete the project?

NEXT: WHAT ARE THE NEXT STEPS?

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Where do we go from here? What is the next critical step to turning the idea into action?

- What is the next key milestone within the project?

- What is a realistic timeframe for the project?



READY TO LEARN MORE?

Naviant is here to guide you through your complete Digital Transformation.
[Reach out to us](#) and we can help you take the next step on your journey!