

Planning for SMB Digital Transformation

MAY 2023

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Recent events have brought about supply chain delays, virtual workplaces and other disruptions in organizations of all sizes, but in particular small and medium sized businesses (SMBs).

Through all the turmoil, SMB and midmarket technology leaders must remain laser-focused on delivering real performance improvements and adding value to the business. Read on to discover everything you need to plan your IT initiatives and accelerate digital transformation in these dynamic market conditions.

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10 digital transformation goals to consider

ERIC ST-JEAN

Companies may pursue digital transformations for different reasons, but the goals they seek to achieve are often similar.

Setting goals before embarking on a digital transformation is an important part of the process. The goals will help the organization allocate resources, communicate about the digital transformation with employees and outside contacts, and measure progress as well as ultimate success. Company leaders can learn about some of the most common digital transformation goals and decide if those goals are worth pursuing for their own digital transformation.

Here are 10 potential digital transformation goals.

1. IMPROVING WORKER PERFORMANCE

Reducing or eliminating manual processes is a common digital transformation goal. Manual processes are slow and error-prone, since users must rekey data multiple times.

Automated processes can relieve employees of many manual tasks. For example, an automated system may only require invoice approval if the dollar amount is

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over a certain number. This automation frees up approvers to focus on more important tasks.

2. OPTIMIZING CUSTOMER SERVICE

An outdated customer service system may lead to a company embarking on a digital transformation.

Customer service agents must be able to easily find the customer in their system, see past tickets and quickly get to work on the customer's new request. A new system can lead to faster case resolution and potentially improve customer experience with self-service options.

3. SIMPLIFYING THE CUSTOMER EXPERIENCE

Customers must be able to easily find the product or service they are looking for, so a company may decide to simplify and improve its site as part of a digital transformation. This process may include making it easier for system administrators and marketers to update the site or simplifying the payment process.

Simplifying the shopping experience can lead to fewer customer support calls and improved overall customer experience.

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4. STREAMLINING ACCOUNTS PAYABLE PROCESSES

Automating manual processes is likely the first aspect of improving accounts payable operations that comes to mind, but a digital transformation can benefit the department in other ways as well.

A digital transformation can improve vendors' processes for submitting invoices and receiving payment status updates. Internally, a new system may improve reporting, ease of use and integrations with other finance systems.

5. IMPROVING EMPLOYEE EXPERIENCE

Employees must carry out many administrative tasks, including notifying the company of a change of address, enrolling in benefits and filling out performance management surveys.

Implementing new digital technologies offers many opportunities to improve employee experience while also streamlining business processes. A new system may also offer previously unavailable employee services.

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6. IMPROVING SCHEDULING AND TIMESHEETS

Digitizing scheduling and time tracking can greatly benefit employees and the company. Moving schedules online allows employees to look up their schedule anywhere. If employees check in and out as part of their workday, apps on mobile devices can simplify the check-in and checkout process.

Meanwhile, digital timesheets help with tracking hourly employees' shifts, sending the data to payroll and analyzing hours worked versus output.

7. AUTOMATING WAREHOUSE JOBS

Companies with distribution centers can save time and costs by automating as much as the order fulfillment and shipping process as possible. However, this type of digital transformation can be costly, so companies need to plan carefully and potentially carry it out in stages.

Automating warehouse processes may also help reduce errors in the picking process, which can lead to fewer returns and customer support calls.

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8. AUTOMATING CREATION AND UPDATES OF USER ACCOUNTS

One of IT's major tasks is creating and managing user accounts. Employees need access to their email account, systems, network drives and various other applications, depending on their role, and IT must frequently add and delete user accounts as new employees are hired and others leave.

Automating this process frees up the IT team to work on more complex tasks.

9. ELIMINATING COMPANY SYSTEMS

Over time, companies acquire many different systems to accomplish tasks, and as the organization grows, departments or business units may use similar applications. Getting rid of duplicate systems is a potential digital transformation goal.

Doing so saves the company money because of reduced licensing costs.

10. IMPROVING REPORTING AND DASHBOARDS

Companies can potentially improve their reporting and dashboards by acquiring new systems, as old applications may not allow the combining of data from

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multiple systems. Doing so allows employees to generate more sophisticated reports and dashboards and learn more about their processes.

For example, a more advanced reporting system could potentially analyze customer service employees' performance, including customer reviews and case completion rate statistics.



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MARY PRATT, CONTRIBUTOR

As digital transformation has become ever more critical to business survival, understanding which tools create a great toolkit is also key.

Digital transformation has become a top business trend for good reason. Organizations that use digital technologies -- from cloud computing to AI -- to optimal advantage may be more likely to ride the waves of constant disruption, and even use it to their advantage.

WHAT IS DIGITAL TRANSFORMATION?

Digital transformation -- or DX -- is the creation of fundamental business changes through digital technologies. Using computer-based technologies, organizations create new products, services, processes or operations. They may even create a new core mission and strategies to execute it. Digital transformation is not only about using IT to support key functions and the delivery of products and services, but also about using technology to work and perform in new ways, enhancing existing deliverables.

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The concept of digital transformation has been evolving since the late 20th century and requires organizations to keep pace with technology advancements and continuously innovate on their use of them.

In other words, digital transformation is not a final state, a destination to reach or a project to complete; it is a constant state of using tech to change processes, improve the customer experience and deliver more value.

DIGITAL TRANSFORMATION IN CONTEXT

Digital transformation is one answer to digital disruption. The latter is a threat to the existence of conventional businesses that fail to keep up.

The rise of ride-sharing businesses -- starting with Uber in 2009 and followed by Lyft in 2012 -- is one widely used example of this disruption. But digital transformation started even earlier. For example, Netflix's 2007 introduction of streaming movies and other videos also illustrates digital transformation's disruption. So do digital money-transferring services such as PayPal, launched in 1998, and Venmo in 2009.

The common thread among these and other digital disruptors is their use of information technology to transform traditional products and services, from taxi services to entertainment to banking.

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Executives at most organizations have been feeling the pressure to likewise transform -- or face extinction. Nonprofits and government entities also have been feeling that pressure, recognizing that they, too, must keep up to meet constituent demands for digital services and digital engagement.

Seventy percent of business leaders face major digital disruption, and 85% believe the disruption will either maintain its pace or accelerate, according to the "Digital Disruption: New Face, Same Brutal Pace" report published by the management consulting firm Bain & Company in September 2022.

BENEFITS OF DIGITAL TRANSFORMATION

Digital transformation is not merely a technology endeavor. Rather, its entire focus should be on using technologies to support organizational objectives and achieve better performance.

Digital transformation offers businesses many potential benefits. They include the following:

- **Improved customer experience.** Digital tools enable customers to more easily interact with the organization for information, services and purchases. Those same tools also enable the organization to deliver personalized services in both real life and online.

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- **Access to data-driven insights.** As organizations modernize their tech stacks, they're better able to collect and analyze data to deliver near real-time insights that lead to more accurate decision-making and personalized customer experiences.
- **Modern employee experience.** Tools that create better customer experiences may also improve workplace processes. Increased automation, the use of intelligent systems and other digital technologies may help deliver experiences that employees have come to expect in their personal lives. Digital transformation may also help improve worker productivity. For example, automating repetitive tasks can increase the amount of time that workers have to focus on more complex high-value tasks. Automation and other transformations may also reduce errors and improve accuracy. Technologies such as data analytics, AI and machine learning may help workers more efficiently tackle tasks, providing even more productivity gains.
- **Built-in cybersecurity.** Cloud software vendors have put a lot of effort into security and updates that address vulnerabilities, though hackers may be more focused on exploiting cloud software.
- **Potentially improved resiliency.** As organizations embrace cloud computing to replace old technology, such as on-premises data centers, they gain from their vendors built-in redundancies that help to guard against outages.
- **Better adaptability.** People's appetites are increasing exponentially for the fast, easy and personalized experiences that digitally advanced organizations offer. Organizations that meet those expectations and can nimbly respond to

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changing expectations have a greater likelihood of surviving than those that don't.

DIGITAL TRANSFORMATION TOOLS

Although process improvement and culture change are key elements of successful digital transformation, information technology is clearly the single most critical component for success.

That's reflected in enterprise spending plans.

The global digital transformation market was valued at \$594.5 billion in 2022, according to the "Digital Transformation Market" report published by market research company MarketsandMarkets. The report forecasts that the market for DX technologies will increase at a compound annual growth rate of 21.1% through 2027 to hit more than \$1.5 trillion.

A number of key tools can support and enable digital transformation. Here are 10.

1. Analytics, artificial intelligence and machine learning

The digital sphere generates a staggering amount of data every day, so organizations seeking to use that data to gain insights and become data-driven

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enterprises must use analytics, AI and machine learning to turn that raw data into information they can use.

2. Automation

Organizations committed to transformation must be agile, which in part means eliminating as many manual tasks as possible through automation technologies such as robotic process automation.

3. Cloud CRMs

Organizations must deliver a consistently stellar customer experience to remain competitive in this digital age, which makes cloud customer relationship management an essential tool within the modern tech stack. Like all cloud-based technologies, a cloud CRM takes the day-to-day management of the system out of the organization and places it into the vendors' hands. That typically means higher efficiency and potentially lower costs, while its cloud infrastructure means everywhere and anywhere availability of the systems.

4. Cloud ERP

An ERP system itself helps streamline operations, improve efficiencies and facilitate data-driven activities by consolidating the information from various functions and departments into a single system. Cloud ERP offers this with

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anywhere, anytime accessibility. That accessibility gives cloud-based systems some advantages over on-premises ERPs, though cloud ERP has its downsides as well.

5. Digital accounting software

Digital accounting systems typically feature automation and intelligence, which can reduce manual work, improve accuracy and bring efficiencies to the accounting function.

6. Employee self-service platforms

As the name suggests, employee self-service technologies enable workers to access job-related and, in particular, HR-related information and services through web-based portals. These platforms create digital workplace experiences that help reduce friction for workers seeking such information and services, speed the delivery of the information and services, and reduce the costs of doing all that.

7. Low-code/no-code platforms

These platforms are software development tools that essentially eliminate the need to write code when creating new capabilities. They do this by offering a visual software development environment, with drag-and-drop components that

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allow business users -- sometimes called "citizen developers" -- to quickly build lightweight applications as well as application features and functions. These platforms also free up developers to spend their time on more transformative application creation, bringing further agility and efficiency to the digital enterprise.

8. Predictive and prescriptive analytics

Predictive analytics tools use algorithms to analyze data to create highly accurate predictions. Prescriptive analytics tools go one step further, using algorithms to first make predictions and then forecast outcomes if prescribed actions are taken. Both classes of technologies help organizations plan more efficiently and effectively.

9. Security tools

As every facet of an organization weaves in technology, the ability to secure the technology stack and protect all the data that systems hold has become paramount to meeting regulatory requirements as well as consumer and employee expectations.

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10. Team collaboration and communication tools

The number of distributed teams had been climbing through the early part of the 21st century, but it increased exponentially during the COVID pandemic. At the same time, organizations engaged in transformation have required ongoing, cross-functional ideation and innovation. To support hybrid and remote work success, communication and collaboration tools have become critical.



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JOHN MOORE, INDUSTRY EDITOR

CIOs, having lived through years of digital transformation, are now taking a fresh look at the practice and how it fits -- or doesn't -- in today's abruptly changing, uncertain world.

A decade ago, digital transformation emerged as an antidote to digital disrupters upending the corporate status quo. Traditional businesses would need to fundamentally change and adopt digital business models to survive. The transformation trend got a reinforcing push from COVID-19, which caused companies that hadn't yet to rapidly digitalize.

The pandemic revealed some of the limitations within the digital transformation program, chiefly that initiatives were a bit ponderous and must move faster. The subsequent overlapping crises of inflation, European warfare and slower business spending have only underscored the need to revisit digital transformation.

Linh Lam, CIO of Jamf, an Apple device security company based in Minneapolis, has led transformations at various companies since 2012. Digital transformation became a buzzword over the years, and Lam suggested businesses now experience a certain amount digital transformation fatigue.

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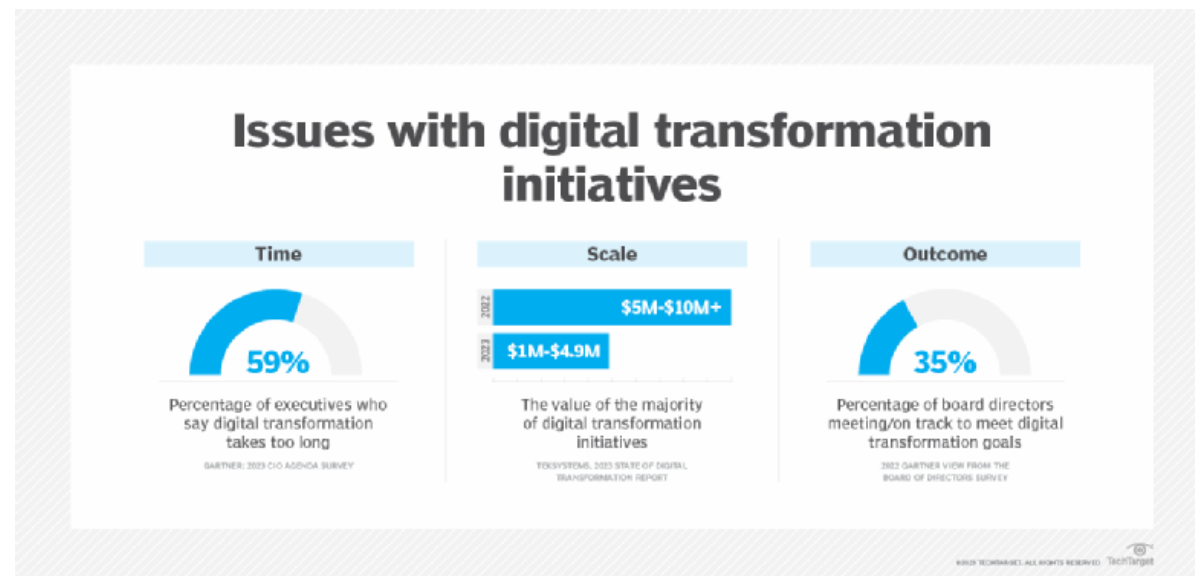
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"It's been around for a long time," she said. "We've seen a lot of large programs go very successfully -- and we've seen a lot of large programs look completely different at the end."

IT managers point to several ways they're changing up digital transformation or avoiding it altogether. Those include a shift to shorter, focused initiatives; an emphasis on hyperautomation; an increase of agile approaches; and a predilection for projects that integrate existing IT systems in effective ways.



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A SHIFT TO SMALLER INITIATIVES

The reason big deals may never arrive at their initially intended destinations has to do with scale. Sweeping, change-the-business projects take time to complete, and fast-moving events tend to overtake them.

"The speed of business doesn't wait for you to finish up your programs," Lam said. "Your operations and your investments tend to react to what we're going through right now with all the macroeconomic-type changes."

As a result, the large-scale, long-haul projects of previous years are giving way to smaller, quicker efforts.

"When I think about transformation now, I try to steer away from using that broad term and thinking more in terms of more focused initiatives," Lam explained.

That calls for understanding the value a business aims to achieve across different time horizons, from the immediate to the long term. In the near term and midterm, an organization can likely find ways to reach its objectives without running a huge program, Lam said.

"If you put all your eggs into one basket and have a really big program, that's a lot of risks," Lam said. "It only takes one or two things to go off course to delay the entire program. And that's where the fatigue really sets in."

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DIVERSITY AND DIGITAL ADOPTION

Diverse teams are a must for effective technology uptake. Demographics influence how people use technology, but IT leaders can miss the subtleties.

Jamf's Lam pointed to the difference in how she uses technology tools and websites compared with her parents and her 10-year-old daughter.

"The way that she interacts with things is very different from how I interact with them, and I think I'm decently savvy versus my parents, who need a lot more help," she explained. "Depending upon the type of business you're in, you have to have a really good understanding of the demographics of the customer base."

The same principle applies to cultural differences. Lam's customers -- Jamf employees -- extend beyond the U.S.

"I can't just have a team that's only sitting in the U.S., trying to think of solutions for team members that ... may be sitting in Poland or the Czech Republic," she said.

Projects vary in duration depending on scope, but Lam said she likes to deliver value within two quarters. "Six months seems long enough -- you could do a lot in terms of delivery -- but also short enough where people aren't going to lose their patience," she noted. "Anything that pushes to about a year, you run the risk of the business changing or requirements changing along the way."

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Large-scale transformation isn't obsolete, however. Lam cited the example of a company that seeks to manage its digital assets but lacks a content management system. Those sorts of projects, where the business essentially starts from zero, need to be bigger. That said, even larger programs can be segmented into phases that demonstrate value over the course of the initiative, Lam added.

AUTOMATION AS TRANSFORMATION

For Brian Kursar, chief technology and data officer, group vice president, digital technology, at Toyota Motor North America (TMNA), automation stands out as the new look of digital transformation. The company had been using the cloud, which many businesses tap as an agent of transformation, for nearly a decade. But its thinking on how best to run the cloud took a different turn in 2021.

"What's really changed for me is this term: hyperautomation," he said. "You're getting out of [COVID-19], and you're recognizing that we were doing stuff pretty well, but a lot of it was manual. We did not have all of our processes automated. So that's where we really took a step back."

TMNA's software developers had been working in a process-centric cloud. A developer needing a cloud environment filled out a request form, which was reviewed, and the cloud instance was provisioned. An issue with the

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environment -- a developer not having the right level of access, for example -- would require another form to rectify.

"Honestly it was cloud done the wrong way," Kursar said.

TMNA two years ago rolled out a development platform based on Spotify Backstage, an open source technology for creating developer portals. The platform, which developers use to build and manage applications on AWS, automated previously manual processes. Self-service features, for instance, replace filling out forms. The automated services also embed the company's security protocols and cost-tracking guardrails.

Automation as transformation helps TMNA take costs out of its IT infrastructure. This frees up funding for additional innovation.

"Just by putting in the Backstage platform, we saved over \$10 million," Kursar said. "Those are dollars that go directly back into investing in our business."

As a result, TMNA can increase its focus on data science and analytics. "We're working with the business to connect datasets that they've never been able to connect before," Kursar said.

Chaining datasets together helps the company understand the customer journey and the steps along the way that determine whether a customer buys another

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Toyota. Doing so is far from cheap. The task requires robust data warehouses and data lakes to support cross-functional queries, Kursar noted.

"If we don't automate the majority of the heaving lifting, we are never going to be able to focus on those value-add initiatives," he said. "I always tell my team, 'Automation is our salvation.'"

Transformative approaches

BRIAN KURSAR
Chief technology and data officer, group vice president, digital technology, Toyota Motor North America
"Just by putting in the Backstage platform, we saved over \$10 million. Those are dollars that go directly back into investing in our business."

EMILY GLADING
Senior director for information systems, YMCA of Delaware
"A huge part of our Salesforce implementation is integration with Formstack. It's been a huge bonus for us."

MARK SCHWARTZ
Enterprise strategist, AWS
"[Delivery teams] can treat costs as one of the engineering parameters they are optimizing for."

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AGILE VS. DIGITAL TRANSFORMATION

Enterprise-wide agility, rather than digital transformation, has become the guiding IT strategy at Quickbase, a no-code platform provider based in Boston.

Dalan Winbush, CIO at Quickbase, called digital transformation an "overly saturated term." Instead Winbush pursues agile practices such as the Scaled Agile Framework (SAFe). The idea is to help the business weather rapidly changing business cycles.

"Predicting the unpredictable is the new market differentiator," Winbush said.

Hyper-fragmentation, however, blocks the path to agility, he added. This condition, which results in operational friction, stems from layers of disparate technologies. CIOs have identified interoperability as among the key challenges of 2023.

"As organizations adopt more point solutions to deal with complex work, there is a growing separation of data and systems," Winbush said.

Hyper-fragmentation surfaces in a business' processes, where inconsistent execution becomes an issue. SAFe plays a role here, providing a set of practices for adopting Agile methodologies for rapidly delivering high-quality products and services. Winbush said structured frameworks like SAFe Agile helps enterprises "drive predictability through uncertainties."

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The objective is to ensure a business concentrates on its most pressing agenda items. Quickbase uses what Winbush called "intentional ceremonies" to make sure that happens. Those ceremonies include annual operating planning, which aligns programs, initiatives and teammates to focus them on the most valuable work; quarterly programming to focus on quarterly and monthly deliveries; a monthly cadence of progress check-ins on quarterly goals; and 2-week sprints ensure working teams can achieve their most valuable deliverables.

This approach lets Quickbase pivot when necessary instead of becoming reactive to market or competitive climate changes.

MANAGING CLOUD TRANSFORMATION COSTS

Condensing digital transformation initiatives can make them easier to manage. But organizations also need to make them more cost effective -- with the cloud being one area ripe for expense reduction.

Mark Schwartz, an enterprise strategist at AWS and former CIO of U.S. Citizenship and Immigration Services, said he views cloud cost management as an ongoing task rather than a one-time infrastructure investment consideration.

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In addition the cloud cost management burden should be shared more widely within organizations. "The responsibility for managing cost is no longer simply a centralized responsibility," he noted.

While CIOs and CFOs continue their traditional cost-management roles, distributed IT delivery teams can also contribute.

"They can treat costs as one of the engineering parameters they are optimizing for," Schwartz said. "They can write code to consume fewer resources in the cloud and select instance types that are less expensive to run."

Disconnected systems and data, meanwhile, lead to duplication of work, miscommunication and execution delays, according to Winbush. Fragmented systems then contribute to process problems. Process flows are duplicated or interrupted when a network of systems can't share information at the point of transaction, whether a system or a human, he said.

IT leaders should build connections between systems to ease information sharing, Winbush advised. He also recommended pulling disparate data into a single source, a move that supports processes, decision-making and data visibility. Bringing together workflows and data facilitates cross-functional work, he added.

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PRAGMATIC INTEGRATION

Digital transformation often hinges on a new application. But for the YMCA of Delaware, its latest round of transformation focuses on integrating existing systems.

The organization's core membership-management applications are Salesforce and Formstack. In 2019 the YMCA of Delaware deployed Salesforce components including Nonprofit Success Pack and Experience Cloud. Its use of Formstack's form creation and workflow automation software goes back even further -- about 10 years.

Emily Glading, senior director for information systems at YMCA of Delaware, said the organization originally used Formstack to fill in some feature gaps its older CRM system didn't address. Once the YMCA switched to Salesforce CRM, however, Glading saw a new possibility: connecting Formstack's forms to Salesforce.

"A huge part of our Salesforce implementation is integration with Formstack," she said. "It's been a huge bonus for us."

The Formstack-Salesforce integration helps the organization track customer requests such as membership holds. A member can ask the YMCA to temporarily suspend membership and pause the monthly fee -- an action that requires a

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written request. But the integration lets a member submit a request through Formstack. Data from the form flows into Salesforce as a case, which lets YMCA personnel keep tabs on customer issues. YMCA staff can pull stats on how many requests they receive and how fast those requests are being processed, Glading noted.

The integration also automates workflows surrounding member contracts and liability waivers. Around 14,000 new members join the YMCA of Delaware each year. The Formstack-Salesforce connection eliminates manual data entry and avoids other problems such as illegible handwriting.

"It's really improved efficiency and accuracy," Glading said.

Agility is another offshoot of the YMCA's expanded use of Formstack. The no-code platform lets the YMCA of Delaware's three-person IT staff -- and designated users, such as branch business managers -- quickly create forms as the need arises. Glading cited the example of field trip permission slips, which the organization created in a matter of minutes. Parents fill out the Formstack-created slips, and the data is stored and accessible via Salesforce.

A permission slip form is a small project that makes a big difference. The YMCA of Delaware relies on such documentation for risk management and state licensing.

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"It's not glamorous," Glading said. "But we can come up with a solution to a problem that someone is having -- and we're not going to have to outsource and have someone else develop it for us."

Transformation challenges

LINH LAM
CIO, Jamf
"If you put all your eggs into one basket and have a really big program, that's a lot of risks."

DALAN WINBUSH
CIO, Quickbase
"As organizations adopt more point solutions to deal with complex work, there is a growing separation of data and systems."

ANGELIC GIBSON
CIO, AvidXchange
"Thin-slicing work to create incremental value over the same time horizon is critical."

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A MULTI-PRONGED APPROACH

Digital transformation can stall when organizations fall short on any one of the key dimensions: people, process and technology. A business might need to simultaneously address more than one of the above.

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Angelic Gibson, CIO of AvidXchange, a fintech in Charlotte, N.C., suggested CIOs pay attention to organizational skillsets, instill agility and restructure the scope of initiatives to keep transformation on track.

Creating a workforce ready to deal with an influx of emerging technology is one requirement.

"When approaching digital transformation, executives have to remain focused on putting people in the right seats to drive success," Gibson said.

CIOs planning to deploy new tools and promote innovation should determine whether their people have the right skills to be successful. "If not, it should become their responsibility as a leader to develop this person," she said.

IT leaders should also challenge themselves to be agile, focusing on accelerating speed to market, Gibson said. They should launch training and enablement programs to help employees become agile as well, she noted. "Though digital transformation centers around agility, people are not always agile."

Large-scale initiatives can be restructured as smaller projects with quicker returns, Gibson noted.

"Thin-slicing work to create incremental value over the same time horizon is critical," she said.