

A PRACTICAL GUIDE TO

Planning and Prioritizing Your Tech Investments

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Introduction

You know you need to transform your digital experience—or at least modernize your tech stack and better integrate your systems and data.

The trouble is that you're unsure where to start or what plans to sideline as you move forward. You're not alone. Many organizations struggle with technology decision-making, change, and aligning on direction and goals, especially when tech is constantly changing, and much more rapidly than any business can keep up with.

This white paper lays out a process to help you clarify your vision, align and prioritize projects to your goals, and move past organizational silos, inertia, and resistance to change. By following these steps, you'll set yourself up to build resilient technology platforms with high adoption and ROI.

STEP 1

Identify Your Core Opportunity

Conduct thorough research, assess risk, and analyze industry trends to zero-in on your greatest ROI

STEP 2

Define Your Future State

Define goals, and focus on well defined solutions while analyzing current state vs. future opportunity

STEP 3

Create a Delivery Plan

Develop a clear roadmap, adopt change management protocols and act on the strategy to fulfill the vision

Identify Your Core Opportunity

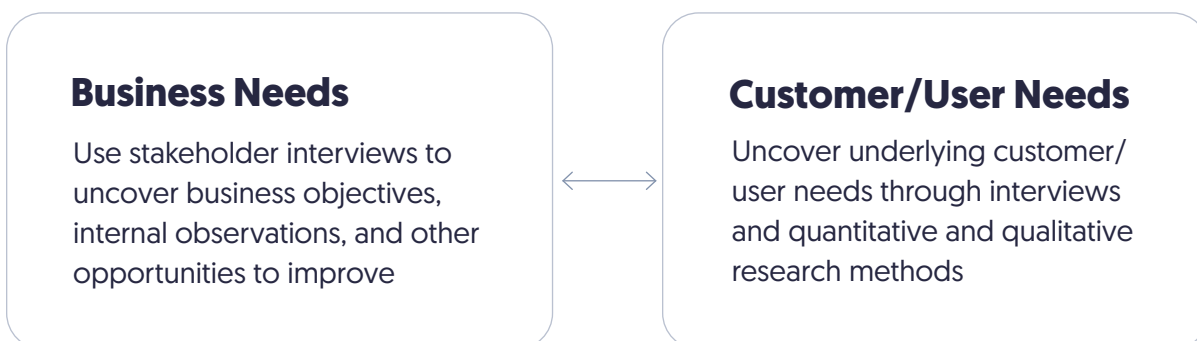
Before undergoing any transformation, you need to identify your biggest opportunity for impact. And to get there you need to deeply understand the state of your organization, the market, and the needs and wants of the people who will be affected.

By assessing your current state with the following activities, you can gain foundational information for determining a strategy and focus that guides your technology investments.



Needs Analysis

Aligning technology investments with stakeholder needs (internal teams, external partners, and clients, customers, or users) is essential. Even if you think you know what will be useful, keep an open mind to see what you can learn. In particular, two types of needs demand recognition.



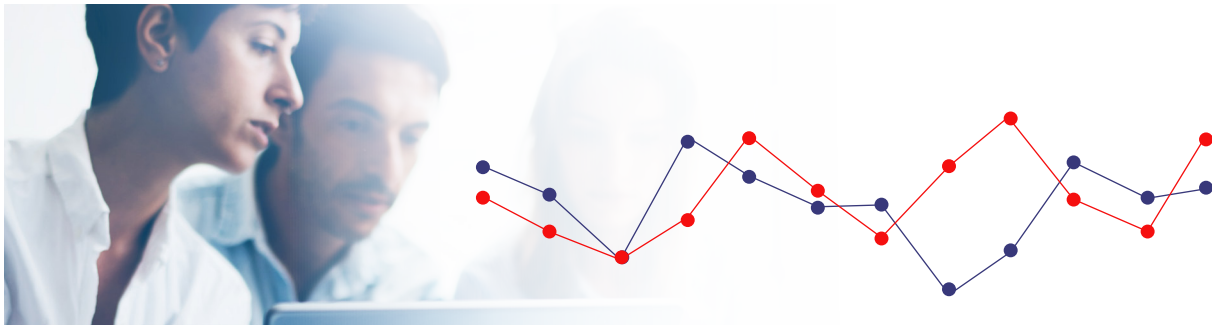
Understanding user preferences, pain points, and behaviors is fundamental, as is identifying where those needs align with business goals and priorities. Conducting thorough research and analysis upfront will allow you to invest in technology where it matters most.

Technical & Data Audit

Assess your existing technical and data assets to identify strengths, weaknesses, and areas for improvement. Likely, some systems or workflows are overly complex and could be simplified and improved. Other technology systems may be ready for sunseting. As you complete your audit, closely examine the connections and flow of data between systems, with an eye toward new integrations that may be needed in a future state. Don't forget to track contract renewal dates, as they will be important as you address timing.

Market Evaluation

Study the market trends, emerging technologies, and competitive landscape for your business and industry. Through this market research, you can identify best practices and better understand your competition. Testing other organizations' software and digital experiences can also reveal valuable insights and opportunities for you to fill a market gap.



Change Readiness Assessment

Many organizations are fearful of change or have change fatigue from trying to hit a constantly moving target. But getting everyone on board is critical to the success of any project. By evaluating your organization's readiness to adapt to change, you can identify and mitigate potential challenges around areas like team and leadership support, engagement, and preparation.

Insights Summary

The insights gained from this discovery and research will point to where new or updated technology could most impact your business. You'll also have found some possible risks—including existing system constraints, data complexities, and even resistance to change. These combined findings can direct your attention to the area ripe for digital modernization and transformation, where your efforts will reap the highest reward.

Define Your Future State

Once you know what area you want to improve, you need a transformation strategy that encompasses what you want your future technology ecosystem to look like and achieve. This strategy should contain the following elements.



Portfolio & Vision Goals

Your vision should provide a clear and concise direction for your technology portfolio, outlining the long-term objectives and strategic goals that will drive your transformation efforts. These goals should have measurable KPIs and align clearly with overall business objectives. Once you document your vision and goals, this becomes a communication tool you can wield to foster a shared understanding among stakeholders, team members, and external parties.

Solution & Architecture Definition

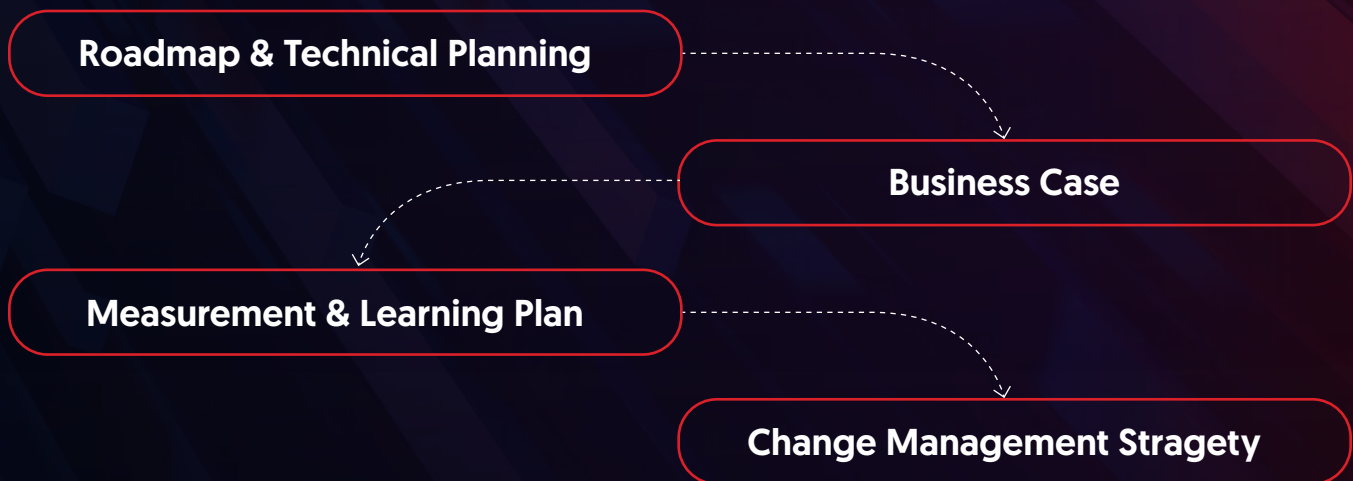
Armed with your strategic area of focus and a clearly defined vision, your next step is to describe the technology solutions and innovations required to achieve your goals. This will require evaluating and selecting the platform that works best for your vision, as well as conceptualizing at a high level the architecture that will support your envisioned solution and ensure scalability, security, and efficiency. Depending on your current state, this solution may include more or less of the technology you already have in place.

Current Portfolio Evaluation & Gap Analysis

One aspect of future planning is figuring out if and how your current initiatives fit into your new vision and goals. You'll need to assess what existing technology and projects contribute to the portfolio vision and what no longer adds value. This evaluation is also an opportunity to identify where goals are being underserved and what gaps need to be addressed to achieve your future state. This undertaking will empower you and your team leaders to make informed decisions and prioritize initiatives that serve the overall portfolio objectives.

Create a Delivery Plan

You've studied where you're at today and identified where your biggest opportunity lies. You've also envisioned and explained what you want your future to look like. Now it's time to dive into the details as you decide how to turn strategy into action. At a minimum, the ideal delivery plan incorporates the following parts.



Roadmap and Technical Planning

If you haven't already, get specific about project recommendations and defining project enablers, dependencies, and risks for current and future initiatives. This involves analyzing various factors, like scope, timeline, budget, technology requirements, and more. Understanding these risks and complexities will help you establish priorities and develop mitigation strategies to increase the likelihood of success.

From this work, you can build a roadmap that sequences initiatives and underlying tactics into an implementation plan over a specific timeframe. (We suggest three years, with the most detail in year one, a medium level of detail in year two, and higher level planning for year three.) Prioritize each initiative based on alignment with organizational goals, potential benefits, risks, and resource constraints. The roadmap should be strategically designed to accommodate dependencies and generate the maximum ROI along the way.

Depending on your situation, you may wish to create multiple roadmaps to demonstrate the pros and cons of different project landscapes or program options.

Business Case

The business case details the estimated project pricing, ROI forecast, and investment model across your roadmap(s). Its purpose is to clearly illustrate the expected investment and return from the planned activities for each year of the roadmap. This document will be essential for getting the necessary stakeholder investment and support for your vision.

Measurement and Learning Plan

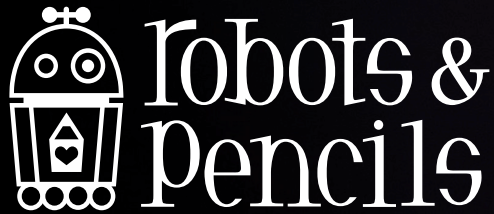
A measurement and learning plan explains how you will define and measure success. It provides a cohesive strategy for continually analyzing and optimizing your portfolio and key projects across the digital ecosystem. The goal is to translate business objectives into measurable KPIs and a framework for success.

A complete plan includes reporting requirements along with key measures and targets mapped to the business case. It also describes the people, processes, and tools needed to measure, optimize, and take action against your business objectives and vision. Depending on the degree to which you're working with existing systems, the plan may also feature an assessment of your current state of measurement and optimization.

Change Management Strategy

For any change to be successful, you must prepare, equip, and support individuals throughout the transformation. This requires a thoughtful, deliberate strategy to help people adapt their routines, habits, behaviors, and skills. One element is a communication and training plan that identifies target audiences, key messages, and appropriate communication channels. It should also outline training requirements, objectives, and methodologies. Additionally, you'll need a strategy that anticipates and addresses concerns and resistance around the change.

It's a common mistake to think change management starts near the end of an initiative. When done properly, pieces of this critical component are actually planned from the very beginning and peppered throughout the timeline. To inform your change management strategy, review any prior change readiness assessments and consider conducting a new assessment specific to your upcoming initiatives to ensure impact.



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