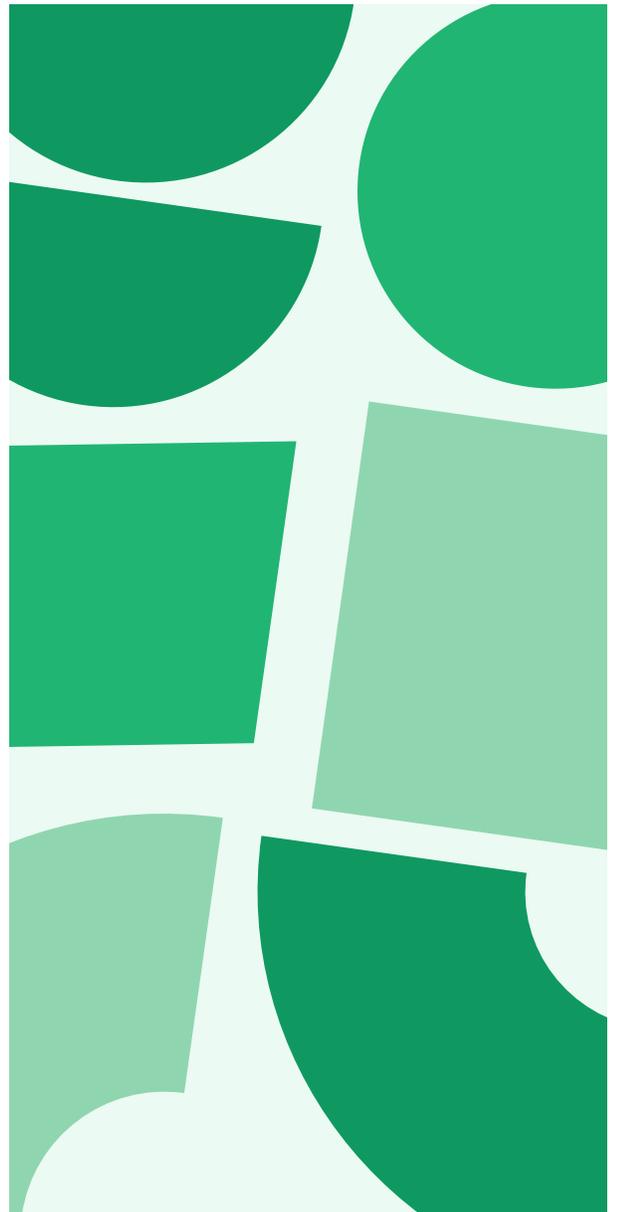


GUIDE

Adapting to a Digital-Must World

Your Digital Transformation Checklist



Adapting to a Digital-Must World

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Adapting to a Digital-Must World

Your Digital Transformation Checklist

It's never been more clear that businesses need to place digital transformations at the top of their priority list. Yet two-thirds of digital transformation projects fail. You can avoid facing the same fate by following the steps in this checklist.

1 Picking the Project

You can't tackle digital transformation all at once. For the best results, begin with one specific project and grow from there.

- Create a list of your biggest workplace challenges
- Identify processes that are inefficient, time-consuming, and/or paper-based
- Talk with teammates to discover which issues impact other departments and teams
- Prioritize projects by most impactful to least impactful

2 Gathering Buy-In

Need to get senior leaders on board? It's all about proving the value of the project.

- Identify how digitization can save time, money, and resources
- Interview employees to gather helpful quotes and insights
- Look for ways to transform the entire organization rather than just one department
- Create a project proposal that includes projections for overall ROI

3

Getting Started

Once you have your project identified and leaders on board, it's time to make things happen.

- Compile a cross-functional team to drive the project forward
- Audit the current process from start to finish to identify issues and needs
- Develop a strategy that outlines the problem, goals, timeline, outcomes, and budget
- Connect with IT and compliance to level set on any must-haves

4

Selecting the Right Technology

The most important part of a digital transformation is finding the right tools and technology.

- Develop a list of must-have and nice-to-have features
- Look for no-code solutions that any team member can use to solve their problems
- Research solutions and compile a list of those that best fit the needs of your project
- Book demos, start trials, and have team members test tools for usability and functionality

5

Perfecting Communications

Producing successful digital transformations depends on strong communication.

- Document the basics (who, what, when, where, and why) within your source of truth
- Set weekly check-ins with all those involved in the project
- Send bi-weekly communications out to any departments impacted by the transformation
- Continuously update the status of project steps, milestones, timelines, and goals



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Launching Smoothly

A well-executed launch can make or break the adoption of your new process.

- Test any new tools, processes, and workflows multiple times
- Document the entire process from start to finish in simple steps and terms
- Get users outside of the project team to test and provide feedback
- Designate one person to handle all questions, concerns, and issues

7

Tracking Progress

Staying informed on adoption and gathering feedback is crucial to building forward momentum.

- Report on tech usage, process adoption, and general project goals
- Set up open meetings for users to seek help, ask questions, or make suggestions
- Create a survey to gather feedback and ideas on future improvements
- Keep communication steady with updates on progress, milestones, and ROI

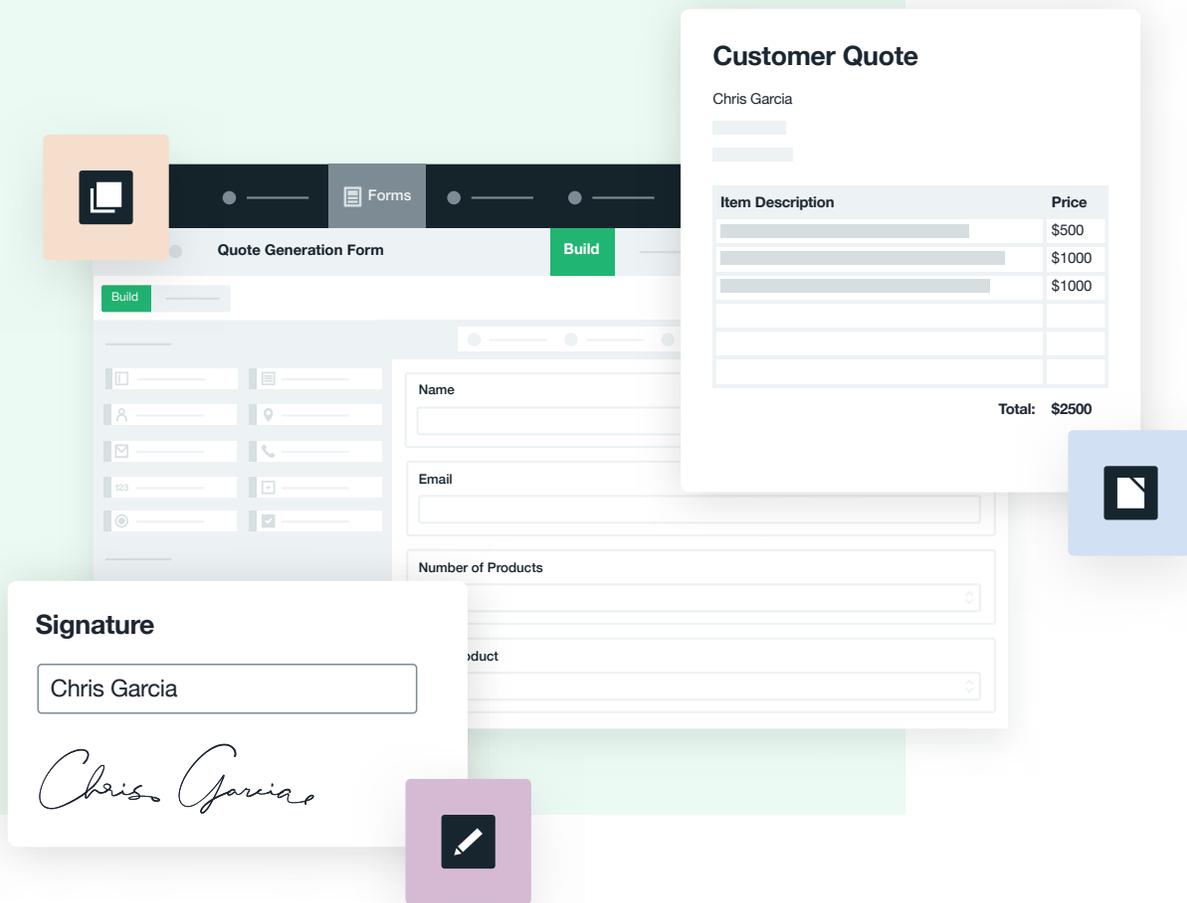
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Reflecting on Success

Digital transformations don't happen overnight. Set yourself up for continued success by reflecting on the process.

- Set a debriefing meeting with the team to discuss what went well and what didn't
- Compare results to goals to identify shortcomings and successes
- Iterate on your original plan to make improvements identified through feedback
- Plan for what's next, whether that's expansion of the current project or a new initiative





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