

Digital Transformation Checklist

Perry Group has assembled this Digital Transformation Checklist, as an accompanying tool (to the *Digital Academy*) to help municipal leaders prepare to become better commissioners of work designed to deliver digital services.

There are four key terms to think about in the context of identifying candidates for your digital service transformation:

Digital - Refers to a mode of operating and delivering services in a way that takes full advantage of modern technologies (web, app, social, mobile, data) to deliver improved experiences, business efficiencies and insights.

Service - A service in the context of this work is something that a user wants to get done examples may include getting a permit, booking an appointment, paying a bill, obtaining a record of vaccination, buying a garbage tag, requesting maintenance on a housing unit etc.

Service Transformation - Rethinking and redesigning services, through the lens of digital capabilities as well as services, equity and environmental aspects, to be better for customers and easier to manage for the municipality.

User – This refers to users of City services which includes residents, businesses, visitors, City Council, the workforce, and partners.

Keep in mind, your services are not digital today if:

- ☐ You rely on many spreadsheets to operate your service.
- ☐ The 'master source' of information is in a paper folder, and there is no master source of digital data.
- ☐ You 'need' many copies of paper submissions
- ☐ Members of your teams spend considerable time typing the same information into different places
- ☐ The people that do the work, aren't the same people that record the work in your systems.
- ☐ Your forms are available as fillable 'PDF' forms, but must be submitted personally or via email, and information is retyped in your systems by staff.
- ☐ You require a visit to your counter to use or pay for your service, for customers to pick up a permit or license.

The Checklist

The following checklist is intended to remind you of the key aspects to consider for your next service transformation initiative:

1. Assess your services against the Good Service Standard introduced in the Digital Academy:

- ☐ Easy to find
- ☐ Clearly explains its purpose
- ☐ Sets the expectations a user has of it
- ☐ Enables a user to complete the outcomes they set out to do
- ☐ Works in a way that is familiar
- ☐ Requires no prior knowledge to use
- ☐ Is agnostic to organizational structures
- ☐ Requires a few steps as possible to complete
- ☐ Is consistent throughout
- ☐ Is useable to everyone equally
- ☐ Should have no dead ends
- ☐ Encourages the right behaviors from users and staff
- ☐ Should respond to change quickly
- ☐ Clearly explains why a decision has been made
- ☐ Makes it easy to get human assistance

Find out more at <http://good.services>

2. Build a coalition:

- ☐ Establish a coalition of key players to help you formulate the transformation approach, and to guide, coordinate, and communicate the vision.

3. Identify the opportunities:

- ☐ Identify your services, understand the profile(s) of your service and your current performance
- ☐ Learn from other municipalities
- ☐ Understand the art of the possible – scan the marketplace
- ☐ Talk to your customers – to learn their pain points/challenges/needs

4. Form a Vision, Identify Initiatives:

- ☐ Take the inputs and with your coalition/team collectively define (and communicate) how the future will be different from the past and how you will make that future a reality through initiatives linked directly to the vision.

- ☐ Identify key initiatives (backlog) and set out the strategy (sequencing of activities – with the goal of starting small, and building momentum)

5. Build Buy-in and Create a Sense of Urgency:

- ☐ Paint the picture of the future (ay in the life, user stories, targets), help others (in your team, across the organization) see the need for change
- ☐ Bring everyone up the mountain

6. Build the Team:

- ☐ Dedicate the right resources (full / part time, second, take them off operations where possible)
- ☐ Build a multi-disciplinary team – Project Lead, Analyst, Developer
- ☐ Engage key partners – IT, Finance, HR, Communications
- ☐ Co-locate your team if possible
- ☐ Identify key change agents that will help communicate/sell the change

7. Remove Barriers:

- ☐ Protect the team – their time, their attention, their focus
- ☐ Remove barriers, empower the team to work across silos, to challenge existing practices, and to generate real impact.
- ☐ Design the future state

8. Short Term Wins:

- ☐ Implement quick, initial wins that form part of the bigger story – start small, boil the frog, build momentum
- ☐ Launch, learn and improve
- ☐ Recognize, communicate and celebrate successes early and often to energize the team to persist

9. Sustain Acceleration

- ☐ Build upon the initial momentum
- ☐ Press harder after the first successes
- ☐ Be relentless with initiating changes until the vision is a reality

10. Embed Change and Iterate

- ☐ Articulate and reinforce new behaviors, (daily, weekly checks) making sure they continue until they become strong enough to replace old habits
- ☐ Enforcement/discipline where adoption is not strong
- ☐ Evaluate and update Job Descriptions to reflect the new mode of operating
- ☐ Iteratively improve the product/service

Important Concepts and Techniques

Remember, we talked about the following ideas and techniques. Which one's are key for the transformation initiative that you are thinking about?

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| ☐ 5 Why's | ☐ Digital Architecture |
| ☐ Avoiding Fake Digital | ☐ Estimating Project Size / Effort |
| ☐ Compounding Benefits – Building on Previous | ☐ Budget and Funding |
| ☐ Defining Services | ☐ Prioritization |
| ☐ Service Ownership | ☐ Change Management Planning and Execution |
| ☐ Collaboration – Building your Coalition | ☐ Day in the Life story |
| ☐ Environmental Scan – Looking & Learning from Leaders | ☐ Digital Architecture |
| ☐ Service Inventory | ☐ Service Patterns |
| ☐ Basic Digital Maturity Assessment | ☐ Good Services |
| ☐ Service Prioritization | ☐ Design Approach – Discovery, Alpha, Beta, Live |
| ☐ Talking to Customers – Journey Mapping | ☐ Digital Service Standard |
| ☐ Talking to your Team | ☐ Service Owner |
| ☐ Business Process Optimization | ☐ DRI – Directly Responsible Individual |
| ☐ Service Design | ☐ Agile Project Management |
| | ☐ Kanban, Sprints, Retrospectives |
| | ☐ Product Management |

We cannot over emphasize the importance of fostering a mindset of continuous improvement. Learn from successes and failures and iterate on strategies. Stay abreast of emerging trends, practices and technologies. Remember that the path to digital is a journey, and organizations should be adaptable and responsive to changes in technology and business environments. Regularly revisit and refresh your digital transformation strategy to ensure continued success.

Good Luck with your transformation!

The Perry Group Team