Digital Transformation:

A Change Management Perspective

AUA Conference – 15th and 16th April

Session 307 – 16th April, 9:15a.m. to 10:30a.m.

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Key Learning Outcomes from the session

By the end of the session delegates would have:

- Considered what Digital Transformation means from the point of view of students and staff
- Considered behavioural competencies that are fundamental to successful Digital Transformation
- Developed an understanding of the pathway to benefits realisation

What is Digital Transformation?

- Digital Transformation is about bringing digital thinking to the heart of the organisation – not just bolted on to the side (as a technology project)
- It is about embracing change, and finding solutions that meet the needs of students, and that help Universities to work efficiently and address external challenges

What is Digital Transformation?

The digital technology in use in different sectors and disciplines varies.

However, Digital Transformation Case Studies demonstrate the need to adhere to a number of key principles.

Digital Transformation is about the 'WHY' and the 'HOW', not the WHAT!

Perspectives of Digital Transformation …

Exploiting digital throughout the organisation, to enhance the visitor journey and extend the reach of the organisation's cause beyond the physical environment.

People, process and technology intersecting to help the organisation better innovate in a 'digital first' world

Engaging with our customers across a range of digital channels in line with their needs –
- **right content**
- **right place**
- **right time!!!**
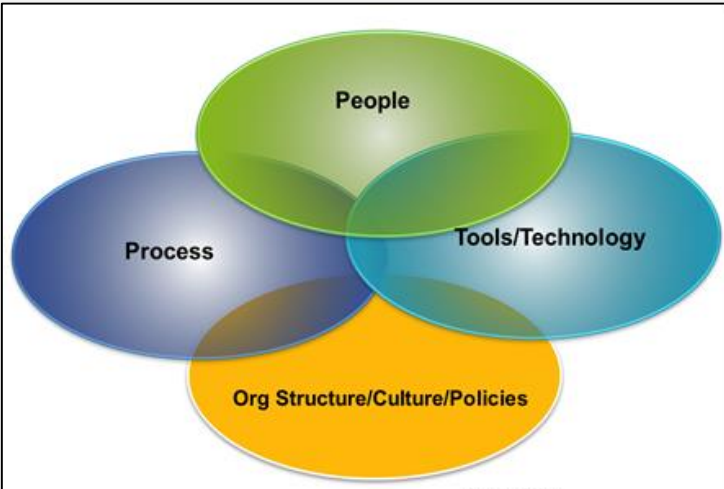
Group Exercise: What does Digital Transformation mean for your University

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What do you want to do?
To exploit the use of digital technology [in what areas?]

Why do you want to do it?
In order to enhance the students experience [in what areas?] and improve efficiency and effectiveness in ways of working

Who benefits?
To benefit students, staff and external partners

How will you achieve this?
Working together, and conducting inter-disciplinary and collaborative research and development, while continually evaluating the pace of digital change and emerging interests in the Higher Education Sector
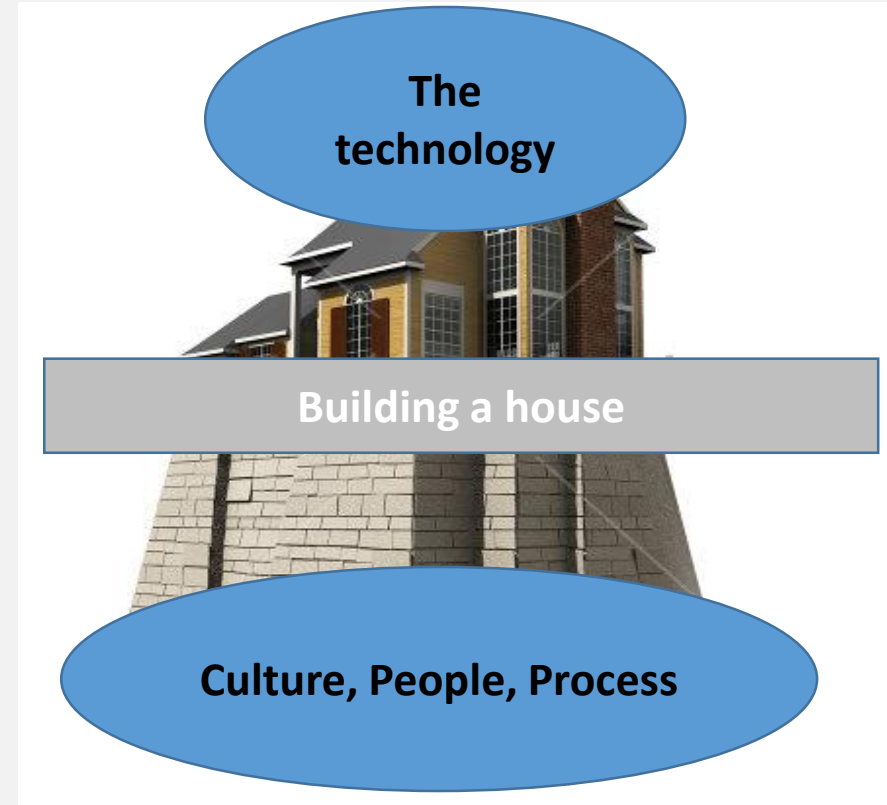
Key Principles

- Adopting a digital way of working is about more than just "technology". It includes changes to people, process and culture (with modern technology as an enabler).
- Customer-focused Digital Design is fundamental to successful digital transformation.
- Value does not come from having digital capabilities. It comes from **using the capabilities**, and using them effectively.
- If interest stops after a 'Digital *Programme* ends there will be no transformation and benefits will not be realised.
- Realising benefits requires strong ongoing sponsorship, re-thinking the way we work, and committing to changing many aspects of the organisation's culture.

Principle 1

- Adopting a digital way of working is about more than just "technology". It includes changes to people, process and culture (with modern technology as an enabler).

The technology

Building a house

Culture, People, Process

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- What does it mean to foster a culture where, as a workforce we are inspired to 'think digitally'
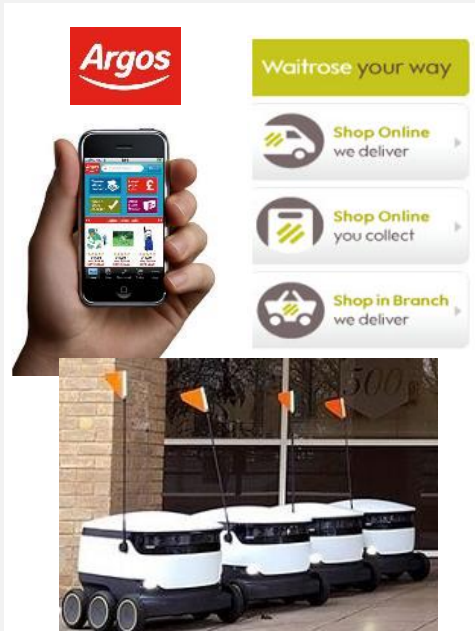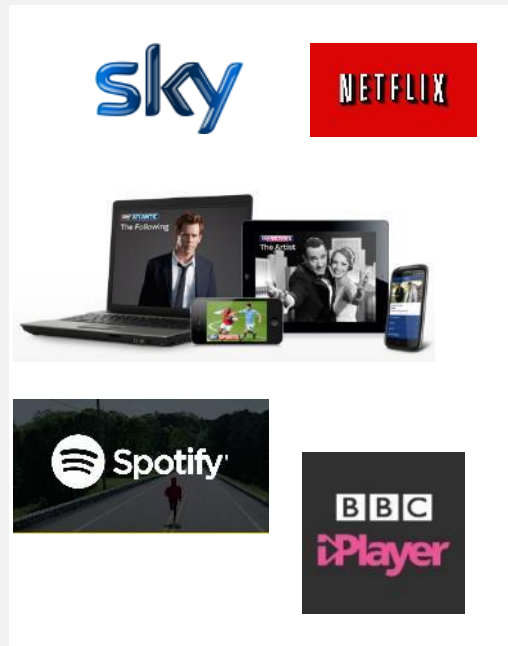
People
Process
Technology
Culture

Principle 2

Customer-focused Digital Design is fundamental to successful digital transformation
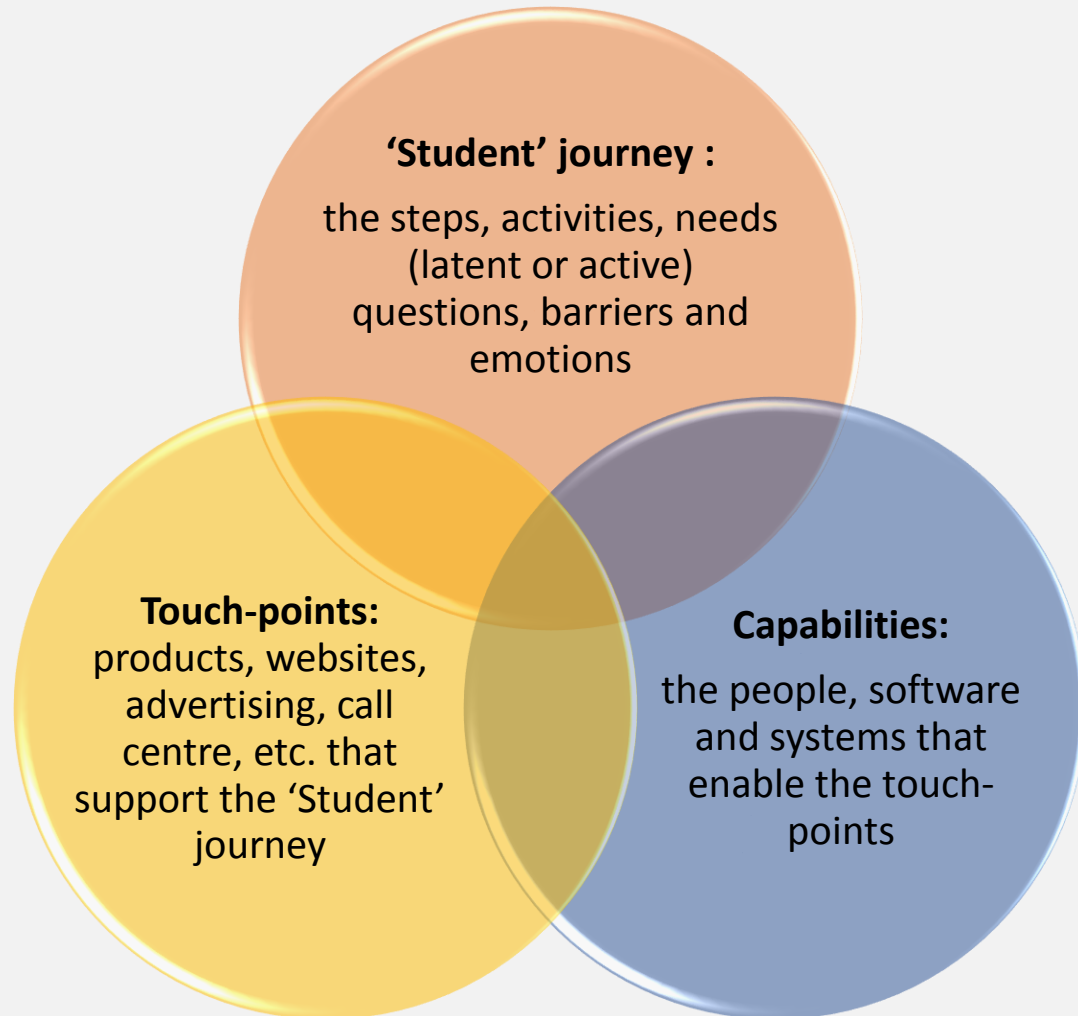
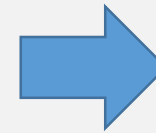- And other sectors are paving the way

| **Retail** | **Media** | **Travel** |

Principle 2

Being customer-led is more than Digital!

Customer experiences have several cross channel layers

'Student' journey :
the steps, activities, needs (latent or active) questions, barriers and emotions

Touch-points:
products, websites, advertising, call centre, etc. that support the 'Student' journey

Capabilities:
the people, software and systems that enable the touch-points

Being Customer-led is more than Digital!

Keep in mind your students' wants and needs at all times → Personas

You can't know enough about your students' wants and needs → Test, test, test

What are Personas and how are they used?

- Portraits of the target audience (students)

- Representing wants and needs of larger groups

- Focused on the most useful design targets

What are they like? What are their goals? What motivates them?
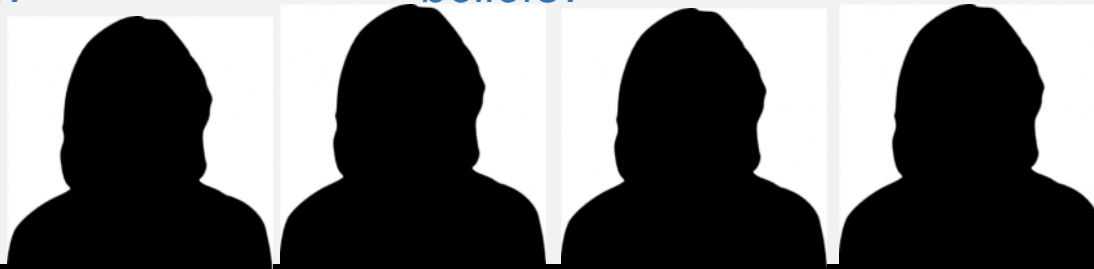
What matters to them? What are their attitudes and beliefs?

What obstacles do they face? What makes their life easier?
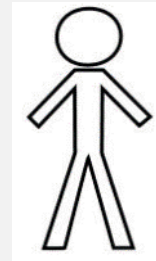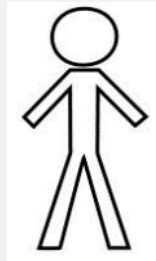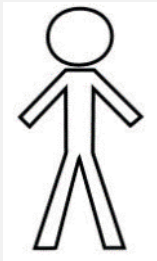
Why use personas!

Immerse in customers' lives

Empathise

Anticipate their wants and needs

Move **beyond usable** to **delightful**

A lot goes into creating Personas

Research
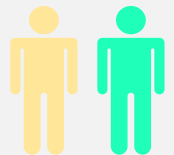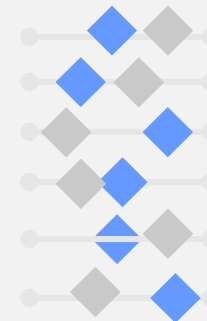
**Modelling
(creating personas)**

Qualitative/Quantitative research

Identify behavioural variables

Plot research participants

Identify behaviour patterns

Add goals, observations & narratives to form personas
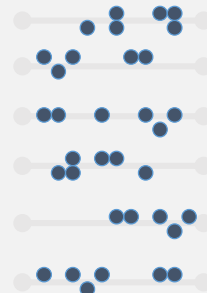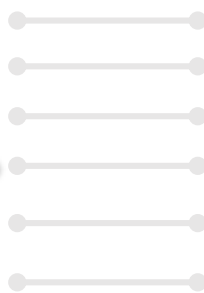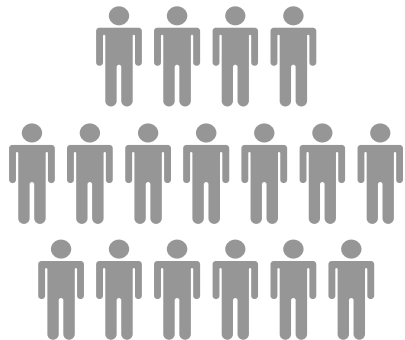
Key Ingredients of a Persona

Goals	Challenges & concerns	Behaviours & attitudes
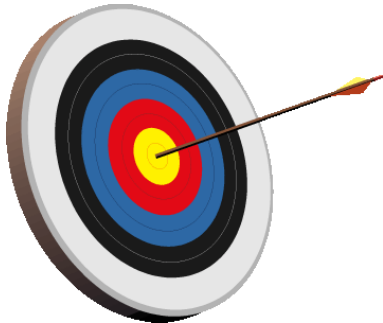
Frustrations	Some facts	Back story

Group Exercise: Who are your Personas – What are their needs

Goals	Challenges & concerns	Behaviours & attitudes

Frustrations	Some facts	Back story

Group Exercise: What would your personas want

- Each group will choose from the following:-
  - An applicant
  - A student
  - A graduate
  - A member of staff

- Choose two personas identified in your group

- Think about the first persona you have and answer the following in the template provided:
  - What 3 or 4 digital experiences are most important to your persona?

- Ask the same questions for the second persona and note the key differences

Tools for customer-led digital design product development (An Overview)

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Analyse the market and competitors

Research persona-based customer feedback

Engage with the project team

Understand the 'as-is' technology state

Develop persona-based prioritised recommendations for features and technology

Initiate conversations with third party suppliers

Get prototyping!

Involve key stakeholders

Test and learn

Address any changes from testing

Liaise with delivery teams to build the final product

"Are U Digital?" is a process for digital project development focused on Customer-led Digital Design

Develop persona-based prioritised recommendations

Prioritisation of ideas means having an objective method of determining the importance of each idea in achieving the overall aims
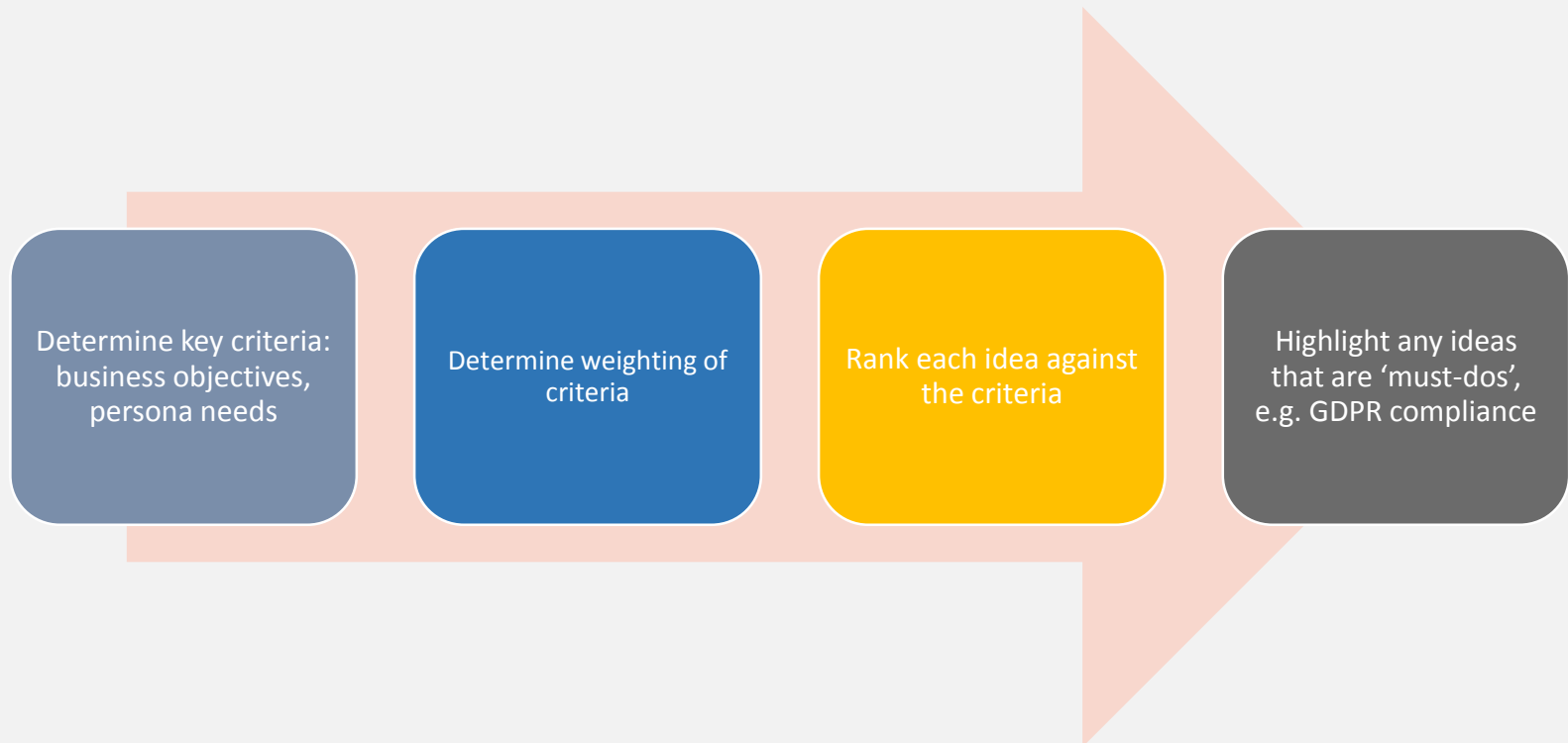
Determine key criteria: business objectives, persona needs

Determine weighting of criteria

Rank each idea against the criteria

Highlight any ideas that are 'must-dos', e.g. GDPR compliance

- Value does not come from having digital capabilities. It comes from **using the capabilities**, and using them effectively!

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Leadership behaviours	Managing teams through change	Building Digital Competencies
E-learning	Coaching	Action Learning
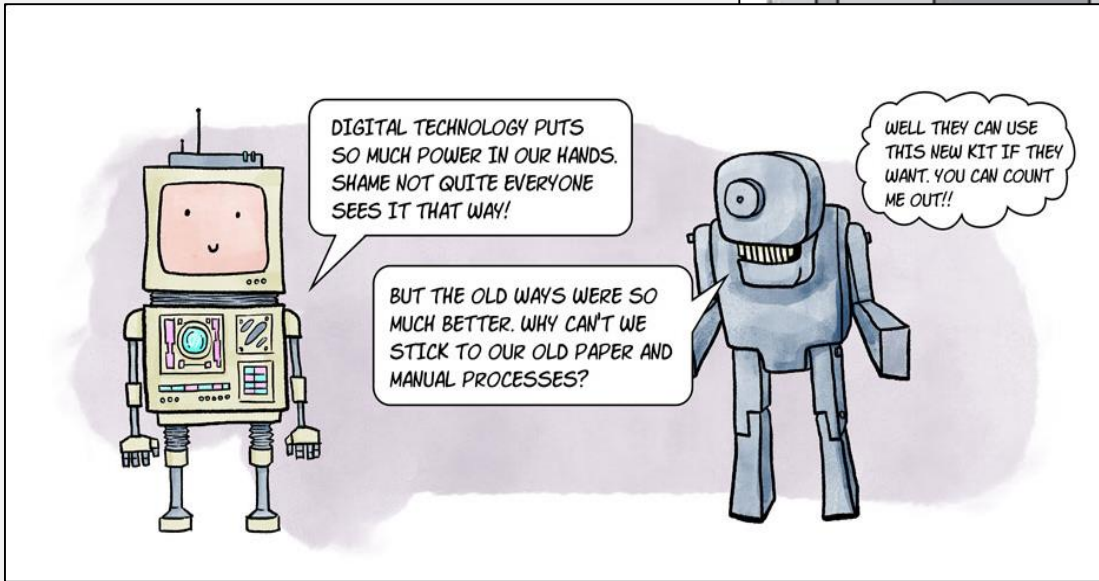
Three versions of an Organisation's Digital Awareness module

🖥️ Customer-Led Digital Design	This module provides an understanding of the fundamental concepts of customer-led digital design.	Digital Competencies
🖥️ Digital Awareness (for front-of-house staff)	This course is for staff who have front-of-house roles and are not managers. It looks at HRP's digital transformation and our digital competencies.	Digital Competencies
🖥️ Digital Awareness (for managers and office staff)	This course is for managers and office-based staff. It looks at HRP's digital transformation and our digital competencies.	Digital Competencies
🖥️ Digital Awareness (for outdoors staff)	This course is for staff who have outdoors roles and are not managers. It looks at HRP's digital transformation and our digital competencies.	Digital Competencies

… Differing in the competency modules that need to be completed -

All courses start with an introductory module and end with an end of course assessment

Competencies	Office-based or Manager	Front-of-House	Outdoors
Competency 1 – Confidence using IT and Digital Technology	✓	✓	✓
Competency 2 – Maintaining accurate and up-to-date data and metadata	✓	✓	
Competency 3 – The importance of a single source of data	✓		
Competency 4 – Appreciating Benefits Realisation	✓	✓	✓
Competency 5 – Understanding digital standards	✓		
Competency 6 – Commitment to continuous improvement and process improvement	✓	✓	✓
Competency 7 – Adapting to change and understanding customer needs	✓	✓	

Group Exercise: Digital Skills and Behaviour - What this means in practice

In your groups discuss the evidence that you would expect to observe (either in yourself or others) to demonstrate digital competence in your University
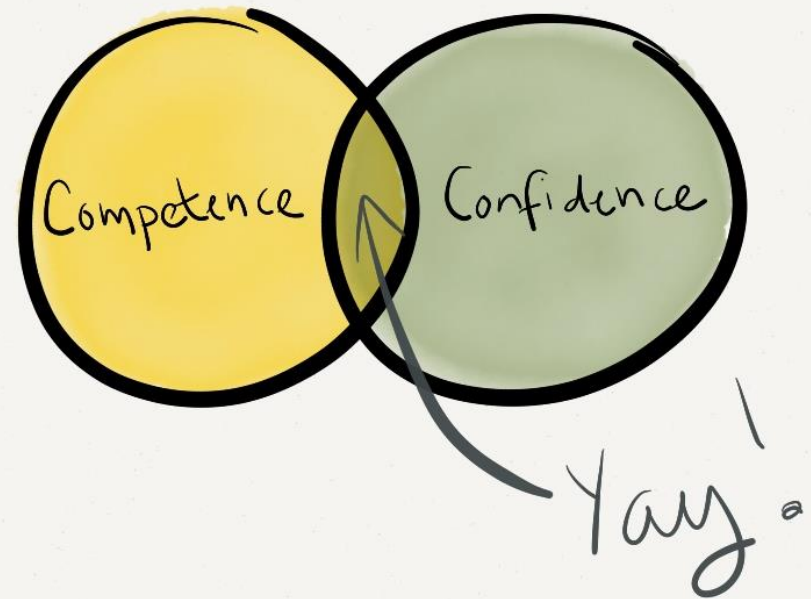
Principle 4

- If interest stops after a 'Digital *Programme* ends there will be no transformation and benefits will not be realised.
- So how do we sustain change?

Where we need to get to:-
Long term business transformation, sustainability and value enabled by digital technology, achieved through commitment to the implementation of a robust Action Plan

Action Plan for long term sustainability – Key Themes

— **Accountability and responsibility** for all phases of implementation (strategic vision, delivery, ownership for outcomes/benefits) need to be clearly defined, with appropriate monitoring and consequences for non-compliance

— **Many job roles and skill sets will need to change** in order to do things differently and reap full benefits from digital business transformation

— Continued **investment in basic infrastructure/ tools** in the workplace is required in order to facilitate digital ways of working across the organisation

— **Balance between digital ambition and resources** is required in order to deliver and sustain digital tools, infrastructure and associated business change

— There is a need to implement **a robust operating framework to support business transformation after the digital programme comes to an end.**

Level of difficulty (vertical axis)

Time to deliver outcomes (horizontal axis)

Top-left quadrant:
- Feed into discussions to prioritise future digital developments
- Consider potential changes to job roles, skills and resource allocation
- Use existing forums to break down silos and share best practice

Top-right quadrant:
- Organisational change to maximize the use of digital technology
- Explore the potential to streamline/integrate disparate systems (in line with organisational strategy and business processes)

Bottom-left quadrant:
- Complete required training
- Follow all policies, guidelines, rules communicated by the specialist teams
- Review and streamline processes

Bottom-right quadrant:
- Implement a coaching programme/action learning for middle managers to support, empower and promote digital ways of working

Governance beyond the Digital Programme

Digital Channels Board

Monitoring and Reporting on progress

Digital Channels and Content Planning Framework

Content Plans/[Owners]

Operational Content [Head of Operations (HCP/Head of Visitor & Commercial Services]	**Commercial Content** [Head of Buying/Head of Marketing, Brand & Web]	**Knowledge Content** [Head of Multi-Channel Production]	**Corporate Content** [Head of Media & PR/ Head of Governance]

Channel Plans/[Owners]

Website [Head of Marketing, Brand & Web]	**Social Media** [Head of Media & PR]	**DVG Product BYOD R&D/Innovation** [Head of Multi-Channel Production]	**Direct Digital Communications** [Head of Customer Engagement]	**E-Commerce** [Head of Retail Business Development]	**Digital Asset Management System** [Head of Records]	**IS Team (support)** [IS Applications Manager]
Off-site	On-site		Pre and Post-visit		Supporting	

Feedback on strategic developments

On-going informal collaboration between Channel Owners and Content Owners

Communication and Engagement ↕

Digital Business Change Network

Communication and Engagement ↕

Teams

Inter-dependent Governance Frameworks

Editorial Forward Planning Group
(To define a joined up content strategy across HRP to support overall strategic planning)

Information Management Steering Group/Information Asset Owners
(Implementing better information management across HRP – to protect HRP's information for future generations)

Principle 5

- Realising benefits requires strong ongoing sponsorship, re-thinking the way we work, and committing to changing many aspects of the organisation's culture.

Journey to Benefits Realisation

Understand the "As Is" Position (Baseline) → Define the improvements needed – Finance, Performance, Safety etc. → Develop the Capability to deliver the required improvements → Develop the Benefits Logic → Based on Baseline and Logic create a forecast to track progress against → **Implement Capability & associated Business Change** → Track "Actuals" against forecast → Benefits Realised

Steps to Benefits Realisation

When new technology is introduced, all organisations go through several stages of development before full benefits are realised!

Culture Change and Re-skilling

Identifying areas of best practice, sharing success and knowledge to facilitate standardisation of business processes and effective use of the new capabilities across the organisation

Embedding

Maximising use of the new tool by refining business processes, and embedding these processes into ways of working

Full Adoption

All relevant activities carried out using the new capability - complying with relevant guidelines and standards

In the short-term productivity is likely to decrease as people get used to the new system. Therefore short term, benefits tend to be improved quality as opposed to increased productivity.

Types of Benefits

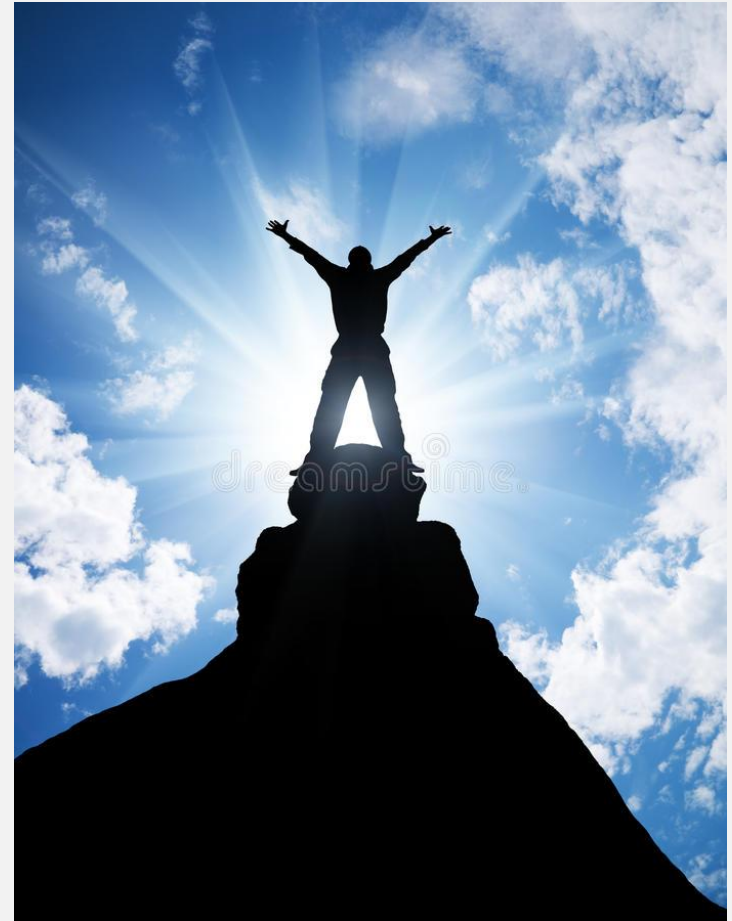## Benefits from Digital Transformation

Group Exercise: Key roles to drive Digital Transformation

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In your University: Who needs to be involved in the various phases of digital transformation to ensure that benefits are realised?

And Finally - What does Successful Digital Transformation mean to your organisation?

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- In your groups agree **three** words that describe your view of what successful Digital Transformation looks like.

- Consider what you want people to:
    – Think
    – Feel
    – And do
    As a result of your Digital Transformation!

Questions