

ROADMAP

# Digital Transformation Roadmap

A phased, vendor-neutral approach to modernising your technology stack and customer experience.

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## Principles

- Technology-agnostic: we advise, we don't sell software.
- Outcomes before tools - decide the business result first.
- Adoption is the goal; a system nobody uses delivers nothing.

## The phased roadmap

### Phase 1 - Assess (weeks 1-3)

- Audit current systems, data flows and manual processes.
- Identify the biggest sources of overhead and risk.
- Agree target outcomes and success metrics.

### Phase 2 - Design & select (weeks 4-7)

- Define the target architecture and integration points.
- Run a structured, criteria-led platform selection.
- Manage vendors and cut through the noise.

### Phase 3 - Implement (months 2-5)

- Oversee implementation alongside your team.
- Migrate data with validation at each step.
- Build dashboards for data-driven decisions.

### Phase 4 - Adopt & embed (ongoing)

- Change management and training to drive adoption.
- Measure against the metrics agreed in Phase 1.
- Decommission legacy systems and reduce cost.

## Typical outcomes

- Reduced manual overhead and operating cost.
- Improved data visibility and decision-making.
- A better, more consistent customer experience.