



A CORETELLIGENT GUIDE

HOW TO BEGIN: DIGITAL TRANSFORMATION

A guide to help you identify opportunities, learn the keys to success,
and begin to prepare for your own digital transformation engagement.

Application Development | Data Warehousing | Workflow Automation | Visualizations



WHAT IS DIGITAL TRANSFORMATION?

Digital transformation combines innovative strategy, technical competence, and leading digital technology to enable businesses to succeed now and in the future. Learn how you can help your company stand out from the competition and secure its market position, all while exceeding customer expectations and maximizing your team's full potential using digital transformation.

In this guide, we will help you identify opportunities for business transformation, tips for success, and how to get started.

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5 Signs You Need Digital Transformation

Digital transformation is essential for businesses in today's digital age, but you may not know why. Here are common issues that can be solved by adopting digital transformation.

5 Digital Transformation Success Factors

Buying new tech and hoping for the best won't work! We share our must-haves for a successful digital transformation engagement and why you should strive to achieve them in your organization.

How to Prepare for Digital Transformation

Strategic planning is vital to successful implementation, but getting the ball rolling can be hard. We walk you through how to prepare for digital transformation and how a consultant can help.

5 SIGNS YOU NEED DIGITAL TRANSFORMATION

Digital transformation is essential for businesses in today's digital age, but you may not know why. Here are common issues that can be solved by adopting digital transformation.

1. YOU AREN'T MAKING DATA-DRIVEN DECISIONS

Issue: Lack of proper data management bars you from gaining insights.

If you don't have a way to properly store and synthesize your data, you simply cannot make fact-based, data-driven decisions.

Common data management pain points include:

- Overwhelming amounts of data that are impossible to manage
- Data coming in from different sources that require consolidation
- Discrepancies in data and reporting
- Too much time lost to report generation
- Inability to access historical data for trend analysis

Make your data actionable with:

- Analytics Services
- Data Integration
- Dashboards, Reporting & Visualization
- ETL (Extract, Transform, Load) Services
- Data Warehousing and Data Lakes
- Data Quality
- Data Governance
- Database Administration

Digital transformation can modernize existing processes, streamline operations, and automate manual tasks for improved efficiency using:

- Workflow automation
- Data integration
- API integration
- Data visualization
- Application development

2. YOUR PRODUCTIVITY STINKS

Issue: Manual operations and outdated processes are inhibiting progress.

An effective, efficient team is critical to your bottom line. If your workforce is struggling to meet deadlines, fulfill requests, or hit targets, it is time to address the roadblocks that are hindering their success.

Common productivity issues include:

- Analog processes that are time-consuming and error-prone
- Multi-step processes that rely on disconnected systems slow down performance
- Poor accessibility that makes secure collaboration difficult for remote office workers and employees in the field

3. YOUR COMPETITION IS WINNING

Issue: User delight is down, impacting customer retention, acquisition

If you are trailing behind your competition, it is important to evaluate how your prospects and clients are being led astray by your customer journey.

Common digital transformation issues impacting customer delight include:

- Unappealing UI/UX creating a lackluster or complicated user experience
- Poor data management and vulnerability to data breaches sparking worry that negatively impacts customer trust
- Inability to respond quickly to customer needs or emerging trends leading to lost opportunities and decreased profits

Digital transformation services that can have a direct customer impact include:

- UI/UX Services
- Web development and enhancements
- Application development
- API Integration
- Data management, including CRM

Key areas of business transformation opportunity can be found in these solution sets:

- Data Management, Analytics & BI
- Workflow Automation
- Compliant Infrastructure

4. YOUR BUSINESS HAS CHANGED

Issue: You need to, but haven't, adapted to your new normal

If your business has switched to a hybrid or remote workplace, or if you've gone through a merger or acquisition, you must make strides to support these changes.

Areas that you cannot overlook include:

- Ensuring data from merged businesses is strategically consolidated and leveraged
- Accommodating increased data, security, and compliance requirements



**The point of digital transformation isn't to become digital.
It's actually to generate value for the business.**

— Rodney Zimmel, McKinsey & Company





How we reduced cost for a leasing client

We helped a financial services client slash the bill of a popular CRM by creating an API in their web application that called on the same data using a different method.

This reduced the number of licenses required to access the data and in turn lowered their subscription cost.

5. YOU ARE LOSING MONEY

Issue: Maintaining the status quo is becoming a financial burden

An allegiance to your legacy tech or resistance to upgrading your operational processes could be eating your budgets at a detrimental pace.

Common areas where cost savings could be hiding:

- Maintaining outdated legacy tech or manual processes
- Missing integration opportunities with existing tech stacks
- Leveraging updated platforms and tools that deliver a better ROI

5 DIGITAL TRANSFORMATION SUCCESS FACTORS

Digital transformation is intrinsically linked to technology, but the most vital digital transformation success factors are less about tech and more about planning, strategy, and support.

Here are our five tips for ensuring a successful digital transformation engagement and why you should strive to achieve them in your organization:

1. BE PROACTIVE

Organizations with successful implementations take steps early to gain a deep understanding of their existing infrastructure, architecture, processes, and teams versus waiting to react when disaster strikes. This includes ensuring stakeholders and product owners are in alignment about the viability of service implementation. A practical starting point begins with identifying objectives early. [Download our IT Planning e-book to get started.](#)

2. AVOID BAND-AID SOLUTIONS

Resist being led astray by reactive urgency. Addressing issues at their root cause prevents recurrence and ensures long-term success. Digital transformation solution experts can help you evaluate pain points, identify areas for improvement, and develop the necessary strategy to keep digital transformation projects on track. This includes providing ongoing maintenance and support to keep systems secure and optimized.

3. FOCUS ON THE NEED, NOT THE TOOLS

Just because a solution or tool seems ubiquitous doesn't mean it's the right fit for you. Some of our greatest client successes have been achieved by leveraging existing tech stacks and optimizing with expertise. Consider your end goals and ability to implement before making costly investments in technology that may not deliver.

4. PRIORITIZE USER ADOPTION

Educating teams and clients on new features allows all parties to feel supported, ensuring successful implementation of digital initiatives. By providing training and being open to feedback, employees can adapt to new methods. Similarly, providing guidance around adjusted customer journeys can help attract new prospects and keep existing brand loyalty intact.

5. DON'T GO IT ALONE

Digital transformation success is possible with the right guidance and support. Internal IT teams can benefit from the help of digital transformation experts to objectively assess needs and create solutions that modernize processes and leverage existing infrastructure. With commitment from within your organization and with the assistance of digital transformation professionals, you can achieve a successful digital transformation.



The key to cutting through the confusion is to see that digital transformation is not a single thing, but a multi-faceted journey with differing goals depending on your industry and digital maturity.

— Harvard Business Review



HOW TO PREPARE FOR DIGITAL TRANSFORMATION

Now that you know what success factors contribute to the best digital transformation implementations, it's time to uncover the steps you can take for winning results.

Digital transformation does not mean buying new tech and hoping for the best. Strategic planning is required to ensure your digital transformation solution has successful, wide-reaching impact that helps departments work together.

IDENTIFY PAIN POINTS

You most likely know your pain points and needs. But if you have ever lost your glasses only to find them on your face, you know it can be easy to miss things that are right in front of you. A digital transformation consulting partner can help you gain a clearer view of your business landscape. But a good preliminary step is to begin listening your teams, customers, and competitor's clients.

- **Listen to your teams:** What is or is not allowing them to perform at their peak? Find out!
- **Listen to your customers:** Are their needs being met? Consider prospects in this exercise, too!
- **Listen to your competitor's customers:** Research your competitors, learn from their mistakes, and see how you can solve their pain points to fix your own.

TAKE STOCK OF YOUR TEAM—AND YOUR CLIENTS

User adoption is critical to digital transformation success, so evaluating the skillset of your team is an essential step towards that goal. Can they execute implementations or will experts be required? How much training will teams need to adapt? How about your customers? Acknowledging and accommodating any potential challenges associated with a steep learning curve is important. Which is why you must...

PLAN YOUR COMMUNICATION & CURRICULUM

Early communication is key to prepare employees (or customers) for change. Set realistic goals for training and transitioning to new working environments and methods, and ensure you factor those deadlines into your project timeline. Consider training modalities like webinars or knowledge base articles that may be required. And once training commences, be open to feedback. Understanding what is and is not working will help you make enhancements or adjustments that will improve efficiency in the long run.





AUDIT YOUR TECH

Take stock of the technology that you use. It may surprise you to find integration or service opportunities in your existing tech stack. You may also find you are paying for tech that's sitting idle or duplicated across multiple departments. A good digital transformation consultant will take a deep dive into your IT infrastructure ahead of your digital transformation project, but having a basic starting point is a good preparatory step.

CONSIDER YOUR TIMELINE & BUDGET

It is important to be mindful of your timeline. How pressing is the need? And how quickly can your personnel adapt to changes? Additionally, consider the size of the change you are making: don't expect instant results that are impossible to achieve. Working in stages can help you keep progress at a viable pace without becoming overwhelming.

Also consider the investment needed and what makes sense for your organization. What technology is already in place? Which features do you really require? Do you have enough people in place to support this initiative? You might find it helpful to make use of managed services instead of hiring an entire team.

HOW A DIGITAL TRANSFORMATION CONSULTANT CAN HELP:

Working with a **digital transformation consultant** can help you identify your strengths and weaknesses, develop a roadmap, and create a strategic action plan that works with your budget.

Coretelligent's digital transformation experts help clients evaluate their business goals, identify challenges, and build technology-driven solutions fully customized to meet their needs. Using an agile approach, we will keep things moving while also keeping budgets on track and expectations aligned with the tasks at hand.

This is part of our unique **build-and-operate approach**. We work with our clients from project development to deployment all the way through ongoing maintenance and enhancements, ensuring clients are fully supported as they grow and scale.



DIGITAL TRANSFORMATION FROM CORETELLIGENT

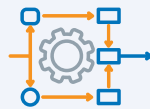
CoreDTS provides operational and business transformation for financial, life sciences, and professional services clients.

CoreDTS, Coretelligent's digital transformation service offering, combines platforms, tools, and expertise to build, implement, and manage a suite of custom solutions:



ANALYTICS, DATA MANAGEMENT & BUSINESS INTELLIGENCE

including Data Analytics, Reporting & Visualization, Data Warehousing, Data Lakes, Master Data Management, Data Quality, Data Governance, Database Administration



WORKFLOW AUTOMATION

including End-to-End Automation Services, SharePoint Implementation, Operational Document Management, Approval Workflows, Employee & Contractor Onboarding, Pipeline Automation & Orchestration Services, Product Onboarding, Release Management



COMPLIANT INFRASTRUCTURE FOR LIFE SCIENCES

including FDA Part 11, HIPAA, NPI, PII, & PHI cloud infrastructure compliance, Compliant Application Interfaces, Streamlined and Secure Solutions



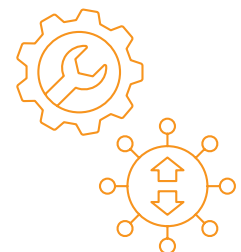
APPLICATION DEVELOPMENT, & APPLICATION INTEGRATION, EMERGING TECH

including AI, Machine Learning, Blockchain, IoT, Mobile App Development, Application and API Integration, Web Development, eCommerce, UI/UX, DevOps, Microservices

AMPLIFYING DIGITAL TRANSFORMATION WITH MULTISERVICE SOLUTIONS

Singular digital transformation services have the capability to revolutionize the way businesses operate, but their true power is revealed when these services are combined and supported. This creates a more comprehensive solution that can maximize potential and deliver an even more significant impact. Popular service combinations include:

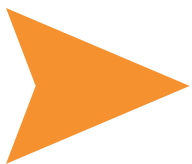
- Mobile app development, including UI/UX services, application integration, data warehousing, analytics and visualizations, automation services, microservices, support services
- Workflow automation with dashboarding insights, including end-to-end automation services, data quality, data analytics, visualizations, and compliant infrastructure





WHY CHOOSE CORETELLIGENT FOR DIGITAL TRANSFORMATION SERVICES?

- Coretelligent operates using a consultative and collaborative approach.
- IT strategy engagement is a part of every project, transaction, and relationship.
- We utilize a build and operate model for transformation services to provide expertise and support from project implementation to ongoing monitoring and maintenance.
- Coretelligent's verticalized expertise means that we already have a deep understanding of the challenges and opportunities of your sector.
- We offer 24/7/365 white-glove support.
- Not only do we offer digital transformation services, but we are a full life-cycle IT partner and offer cybersecurity, comprehensive support, backup and disaster recovery, and co-managed and managed solutions to meet your firm's IT needs.



Learn more about Coretelligent's Digital Transformation Solutions by visiting coretelligent.com, calling 855.841.5888, or emailing info@coretelligent.com.

About Coretelligent



As a leading provider of comprehensive managed IT, cybersecurity, digital transformation, DevOps, IT strategy, and more, Coretelligent enables organizations to seamlessly power and grow their businesses. Founded in 2006 and led by world-class technology experts, Coretelligent's core services are utilized by top-tier organizations in the financial services, life sciences, legal, and technology industries, among others. Coretelligent's headquarters is in Needham, MA, with strategic offices located in New York City, Atlanta, Stamford, Scarborough, and the San Francisco Bay area; with expanded support locations in Dallas, Los Angeles, Philadelphia, Tampa, Washington, DC, and West Palm Beach.

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