Accelerate the value of technology-enabled business transformations

Taking advantage of improved user experience is not as straightforward for corporate technologies as it is in our daily private life.

Leveraging technologies in a corporate context requires fully embedded technologies in the DNA of the organization, on top of technology adoption. Taking into consideration the new, disruptive, and innovative environment we are living in today, it is by mastering the art of change adapted to the ways we are living today that new ways of working are embedded faster and more effectively amongst the employees.

In response, Deloitte has Spotified the experience that drives value and accelerates measurable business results. It has Youtubed leaders, to enable them to deliver on the purpose, and has Uberized an experiential journey that is enabled by high impact engagements combined with digital technology. Deloitte has FitBited targeted behavioral interventions, to nudge and shape successful change adoption, and has Wazed people analytics throughout the lifecycle, driving a focused effort.
Typically leaders consider the “people side of change” around the start of the technology implementation process. Based on our experience we notice that successful technology-enabled business transformations embed the “people side of change” from the start of the transformation journey.

This poses the question of who is ultimately responsible for embedding the technology around the day-to-day of an organization’s employees—in a sustainable and stimulating way. We see that in successful transformations it’s the executive board who takes the responsibility and not only the CIO, HR, or the business.

In terms of allocating the responsibility, research has pointed out that soft skills such as having a transformative vision and solving problems are considered as critical success factors for a technology-enabled transformation. Purple people—those who possess a mix of business and technology skills—therefore seem to be the right candidates to counter major risks such as an unclear vision, lack of stakeholders’ engagement and alignment, missing sponsorship, and inconsistent and irrelevant messaging, which all undermine the technology implementation success.

In this context, Deloitte developed From Vision to Value as a new change management framework based on psychology, design thinking, behavioral economics, scientific evidence, and Deloitte global-wide experience in driving transformational programs to support leaders in effectively managing the “people side of change” throughout the entire transformation journey in the technology-enabled world.

Many organizations struggle to deploy successful technology-enabled business transformations. They tend to treat change management as a separate project, which is poorly linked to the expected business results, inadequately led by its leaders, lacking a personalized and insightful application of behavioral science, as well as change adoption analytics.

The Deloitte From Vision to Value framework takes these lessons learned and generates value by the application of five key principles that were crystalized through the experience of several transformations.

**From Vision to Value principles**

- **Accelerated Business Value**
  An experience that drives value & accelerates measurable business results...

- **Leader Led**
  Leaders are enabled to deliver on the purpose...

- **High Touch, High Tech**
  An experiential change journey that is enabled by high impact engagements, combined with digital technology...

- **Underpinned by behavioral science**
  Targeted behavior change interventions to ‘nudge’ and shape successful change adoption...

- **Precise and measurable through analytics**
  People analytics throughout the change life cycle drives a focused change effort...

To highlight the From Vision to Value approach and the key benefits of the From Vision to Value principles in deploying successful technology adoption initiatives, we describe two case studies.
Accelerate value of the technology-enabled business transformation

Most project leaders find themselves relieved to leave elaborate business cases behind and start the practical "sleeves rolled up" work. However, it is exactly at the start of a project where efforts are needed to define how the business value that was put forward will be materialized, and, more importantly, accelerated throughout the project delivery.

Accelerated impact on the purpose is experienced through design thinking and immersion techniques such as change labs. Traditional and non-traditional change and communications activities are delivered to ready your business. You experience change activities that start up front but continue to include the practical support an organization needs to deliver the behavioral shift that fuels and sustains new ways of working and delivers business results.

Let's take the example of the financial industry organization (Case Study 1) who embarked on a complex Salesforce implementation. To create alignment and commitment early on, the project team applied From Vision to Value techniques to develop five design guidelines that would guide all decision-making and messaging around the CRM implementation. This is important because CIOs and other business leaders rarely use the same parameters to define the success of the technology-enabled transformation. To measure the results of a transformation in a uniform way, it is imperative that leaders sing from the same song sheet, which will create the visibility and transparency they need to demonstrate value throughout the organization.

Throughout the project, these principles played the role of a guiding light in trade-off situations. The project principles were collaboratively created and committed to by leaders during a change cockpit session. This is a particular setup where design thinking, psychology, and a time-boxed approach are used to empower those in the business that need to pilot the change with a roadmap and tools to do so. It is a one-day scripted session that takes place in a compelling and unique environment and is designed to build a sense of ownership and common language about the transformation. After the session, the leaders then actively lived these principles in their work streams and included these explicitly in communications toward affected end users. For example, during the opening of the annual leadership conference, the five principles were elaborated upon, rather than demonstrating the CRM platform itself, hereby setting the scene for project expectations. Moreover, when discussing a potential extra tool integration, the business case did not include the costs and benefits of the integration, but was based on the applicability of the five principles. Those five principles were:

1. Keep a strong focus on the Meaningful Viable Product
2. Clear leadership commitment
3. Adoption over adaptation
4. Co-creation and co-validation with empowered teams
5. CRM for all, not for everything

even used during the backlog crunching and sprint configuration as these defined the user stories that were going to be delivered within a three-week span. It is thanks to a clear alignment on the five principles that the project was delivered on time and within budget—as no time was lost getting distracted long approval procedures and no money was wasted on features that were not core to what a CRM platform is aiming to achieve. The result is a platform that end users considered as meaningful as of day one, and more importantly, that was fully embedded in their ways of working thanks to a complete experiential change journey.

Case Study 1: Context
Consider the experience of a large organization in the financial industry that embarked on a CRM transformation with Salesforce to cover overall sales processes to be able to structure and capture customer information across different touch points and use this information for a personalized proactive approach anytime and anywhere. Over 5,000 employees have been estimated to be impacted by the new technology and need to adopt the new ways of working. Given that the institution was challenged to let go of a significant amount of people and new operational and risk procedures needed to be implemented, an innovative yet sensitively adaptable change approach was needed.

Case Study 2: Context
A worldwide organization in the life sciences industry implemented SAP as a result of a merger between two companies that needed to work as a single business. The goal of the SAP implementation was to integrate the production and distribution facilities. About 400 employees were heavily impacted by the new way of working as a result of the SAP implementation.

The challenge was to make sure that the impact on the business and the clients at go-live was as low as possible (i.e., products are still produced and shipped toward the right customers).
Enable leaders to deliver on the purpose

Leaders often underestimate the importance of their role in the context of a transformation. When leaders announce a major transformation initiative and delegate its execution, they are somewhat missing the (project) action. Employees listen to the leader, they look up to the leader, and they expect the leader to guide them throughout the overall journey. Leaders are considered to be the engine of a successful technology-enabled business transformation, enabling and enhancing the speed of adoption. Their role is to inspire and support employees to get through the “roller coaster” of emotions inherent to ensure a seamless transformation initiative in order to shorten the transition period whereby productivity loss is significant:

- **Vision**: Leaders play a key role in developing a shared sense of direction—clarity on what is changing, why it needs to change, and how the organization will benefit.
- **Sponsorship**: Leaders demonstrate sustained, strong, unified sponsorship
- **Communication**: Leaders establish and communicate the business context and rationale; establish a climate of genuine openness to concerns
- **Ownership**: Leaders are responsible for goal setting, owning the business plan, and monitoring its progress
- **Risk Management**: Leaders mitigate resource allocation, timeline, and scope review
- **Celebrate**: Leaders support and encourage recognition to manage change fatigue

The objective of this creative and collaborative working session was to align and decide on the key actions for a successful SAP implementation. This was a critical milestone before go-live, as leaders were not attending steering meetings; they had no idea about the issues and risks identified by their teams. The outcome was an aligned team, with key actions defined and clear responsibilities assigned.

Equipping and empowering leaders with the knowledge and tools to effectively and efficiently drive, sponsor, and engage employees rather than acting as a silent partner of the transformation represents one of the key success factors of any technology adoption program.

When leaders announce a major transformation initiative and delegate its execution, they are somewhat missing the (project) action.

Consider the experience of the leaders in the Life Science organization in Case Study 2 above. The project sponsor gathered his project stream leads (all leaders in the organization), steering committee members, and senior leaders in a High Impact Session one month before go-live (More details on a High Impact Session can be found in the third From Vision to Value principle).
Design an experiential change journey that is enabled by high impact engagements, combined with digital technology

How many of you have been involved in one of those meetings where you are sitting at an oval table, being presented with carefully designed slides capturing critical points on the transformation journey while you are picking up on business emergencies through your smartphones or emails? In reality, embedding technology-enabled business transformations in the DNA of the organization is all about achieving impact and involvement.

• **Personalize the experience**
  Even entering the room is an experience in itself, expected to have an impact on the participants and pull them away of their daily routine. There might be a screen but no ordinary table and chairs. There is a clear floorplan based on different thinking frameworks and walls to guide them through the carefully designed activities. There are video testimonials of employees and customers, explaining what they expect from the transformation. This is a personalized experience that is quite different from a room with just an oval table.

• **Build engagement and shared purpose**
  Participants are taken along a disruptive and intense journey. They are actively involved in the delivery of the session using scripted scenes tailored to the challenges of the specific organization. They learn from each other, co-create their business future, and align on how to manage their project. The results are pragmatic and fully owned outcomes, with a clear vision, action plans, and communication activities.

• **Use digital technology**
  Furthermore, all this hard work is translated into a video and a visual report that is shared throughout the organization. Next to this, social media is heavily used in an overall communication campaign, but it doesn’t stop there. It remains important to brand the project so that employees identify themselves throughout the overall organization with the transformation if they are not directly involved. Everybody always knows somebody who is part of the transformation. Digital technology strengthens the embedding of the technologies in the DNA of the organization as technology adoption alone is not enough to change the behavior of the employees.

In case of the Life Sciences organization (Case Study 2), branding supported increased awareness of the transformation and buy-in, for example branded mugs, beach flags at every plant entrance at go-live, branded sweets, and users wearing t-shirts with the project logo to make it easy to find them in case of questions. The creation of an overall project identity is key to deliver a smooth go-live and to embed the new way of working into the DNA of the organization. In terms of communication, a technology adoption project is not any different from a business project: You need to speak with high touch and use high tech to make it stick.
Underpin your technology transformation by behavioral science

Arthur Brack's quote, “Software doesn't build relationships, people do,” often passed through the floors at the financial industry organization during their journey for the Salesforce implementation (Case Study 1). When spending significant amounts on a customer relationship platform, this might not be the quote that one wants to hear. But there is a truth to it: The new platform should be used by the employees to build relationships, for it to be worth the investment, and so it did. In a first release of 325 users, 100 percent user adoption has been reached after only three weeks and 8,400 interactions and more than 3,400 opportunities have been created by end users after one week. In the weeks following the key feature, usage increased with 50 percent. Leads are now resulting in 20 percent more business generation and more than 10,000 contributions to the collaboration platform, indicating the increased collaboration to generate business. Finally, end users now only use two tools instead of four to five tools to support their customer engagements, which results in significant time saving. These results are materialized thanks to a multitude of learning initiatives. The key is to design the learning experience keeping the shift in the ways of working (what and how) for the impacted end-user population in mind.

This goes beyond knowing system functionalities and features. It is all about painting a compelling picture of the key activities that the end-user will need to do differently.

Using insights in behavioral science, moments that matter (i.e., key moments in the working life of an end-user where the technology would have a significant impact) have been identified. For example, preparation of client conversations, managing an open opportunity to results, selecting attendees for an event, etc.

These key activities showcase how end-users need to act differently. They were also used as a basis for developing training sessions. Trainings should not be focused on what the platform can do, but rather on what the platform can do for the end-user (i.e., how the platform will add value to her day-to-day work), focusing on the events where behavioral changes will be most critical for the success of the technology.

Likewise, moments that matter can be leveraged in different circumstances during the project lifecycle such as a leadership conference or a communications campaign to showcase what the new technology means for people in the organization.

Adoption analytics can boost your organization’s chances for success in driving technology transformations. They replace hunches and guesswork with insights and quantifiable data about stakeholder issues and concerns.
Use analytics to measure and tailor technology adoption.

Adoption analytics can boost your organization’s chances for success in driving technology transformations. They replace hunches and guesswork with insights and quantifiable data about stakeholder issues and concerns. In the financial services organization case (Case Study 1), before the launch of the CRM platform, the readiness for adoption of the technology has been estimated per region at the end-user and manager level. The assessment entailed both quantitative data—which can be compared to post-go-live and with other audiences—as well as qualitative data, related to six dimensions:

- The assessments showed the side effects—both positive and negative—of the CRM implementation.

On the one hand, the CRM platform significantly contributed to the planning of the agenda for the customer-facing personnel, even though it was not designed for such purposes. This allowed a more efficient scheduling of customer appointments to make the best use of each interaction with the client.

On the other hand, the results of the data analysis showed a gap between managerial speech—supportive of the platform benefits—and their actual use. These insights allowed the organization to focus their change efforts on the right initiative and the right stakeholders at the right time to ensure efficient technology adoption.

To improve customer experience, leaders need to consider the “people side of change” at the start of the transformation journey. Next to this, not only the CIO but the complete executive board need to take the responsibility of turning the transformation into a success. This happens when the new way of working is completely embedded in the DNA of the organization, on top of technology adoption.

Making it happen efficiently and matched with the new technology trends in a disruptive, innovative, and agile environment requires more than traditional ways. It encompasses a series of methods and a distinctive and compelling approach, which fueled the creation of the “From Vision to Value” Deloitte framework.

If your organization is struggling with effectively delivering change through technology adoption programs, you might want to ask yourself the following questions:

01. Do you, as a CIO, have the same explicit aligned definition of success of the transformation as the business leaders? Case Study 1 strived toward a successful go-live within time and budget versus improved customer experience. The definition of clear “guiding lights” enabled the leaders to work together on the same goal to increase the potential of the technology investment. A clear dashboarding approach is key to track progress and increase common understanding.

02. How do you work with new methods like Agile, UX, or sprints? These methods should drive acceleration yet it cannot only be a program or project related way of working. The main change is the way of working and not the implementation of the new technology. CRM software doesn’t build relationships, it enables people to accelerate at getting better at doing it (Case Study 1). Also SAP will not create new materials, it will enable the employees to speed up the process from production to end-user (customer).

03. How do you design the change journey for technology implementations? Building engagement and shared purpose are essential. To make this happen, avoid assumptions (e.g., they know what is happening or why we are doing it). They are dangerous while open and transparent communication will increase overall awareness and understanding about the business transformation.