DIGITAL LEADERSHIP

Transcript
# Digital Leadership

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LESSON 1: FUNDAMENTALS OF DIGITAL LEADERSHIP
Characteristics of Digital Leadership

So what is Digital Leadership? We've got a quote from Ian Schafer saying, “Innovations needs to be part of your culture. Consumers are transforming faster than we are, and if we don't catch up we are in trouble.” I think this is one of the key concepts of why should anyone engage in Digital Transformation, and it also touches on how it should be done. It needs to be a part of your culture. If it’s something that you’re trying to tack on, if it’s something that you’re trying to put a 20-year old intern in charge of, then you’re setting yourself up for something that’s not going to be a part of your cultural fabric of the company, not going to have that potential that it could if it were properly embedded, and understood, and bought into by all different leaders within your company.

So what is your role as a digital leader? Is your role to be the one out there on every channel of social media, monitoring everything and doing all the talking? Is your role to teach other people how to do that? Is your role talking to the board level people to get them accept this? It’s a little bit of everything and we are going to get a lot more into that as we go through this module so but from the top line level, what we’ve done is broken the role of the digital leader and to seven areas so setting the vision, influencing executives and stakeholders, creating a sustainable digital program, hiring A-players, who are going to do a lot of that stuff for you and also feed into all of these other aspects, defining processes for digital excellence, tracking and measuring the impact, and optimizing and continually improving.

As we said before, it’s a quick, fast-paced environment, with lots of rapid change and people rapidly responding to you from both internal and external audiences, so that really completes the circle that we’ve seen in the last slid as well.

What are some of the characteristics of an effective Digital Leader who can do those seven aspects, who can act on those things effectively from within their company? We’ve defined them as an effective Digital Leader is someone who leads, someone who inspires, educates, enables, empowers, fosters partnerships and is accountable. It’s another way of breaking down those same concepts. And the key issue here that I’ve seen with companies I’ve worked with are definitely number two and number three, so someone who inspires and someone who educates. With any kind of program in the company, any kind of change management, you can’t do anything yourself. So this presentation is trying to help you understand what should you be doing in yourself, and what should you be empowering and inspiring to do, and giving them the tools to be able to do that on their own. So we are going to get into that a little bit more with some examples as we go along.

So here’s one of those examples, a case of Digital Leadership, and looking at Burberry as a company. Everybody knows Burberry, Burberry has been around for ages so that’s both a good thing for them and can also be a bad thing for them. Looking especially if you are thinking of them in the fast-paced world of being a fashion company, where everything is always new, everything is automatically always last season as soon as it’s out. Take a look at what Burberry did and how they incorporated Digital Leadership into the fabric of their business.

Back in 2006, Burberry was underperforming against some of its luxury peers. So what is something that they can do to improve that? What is something that they can do to leverage what’s going on in the greater world, to build it into their business and to access some of those markets? Those newer markets that they may not reaching and to refresh their images, with markets that they’ve already been reaching. We’ve got a quote from Angela Ahrendts saying, “We use technology to bring the brands to life in our stores. We’ve develop our stores to showcase our digital innovations.”
Something that has really landed well with what Burberry has done and their leadership is having a top down approach and also a bottom up approach to allow digital leadership to infuse the company from both ends and also from the sides in terms of what are consumers doing, what do consumers want, how are they interacting with that brand online and in person. So if walk into...so it’s coming from both of those directions, which is why it works so well. It’s not something that’s tacked on to the side, as an add on, as a nice to have rather than must have. If you are walking into one of the Burberry stores, you feel like you’re walking into their website.

The experience is seamless, you know exactly where things are, you know exactly where things sit in the position in terms of what you’re trying to buy, the product, the image, the feeling as consumer, and the same is true if you visit them online. As soon you visit Burberry’s website, you are immediately launched into a fashion show, you’re sitting in the front row and watching models in this season’s fashions in video, walking past you as if you’ve already been transported there.

Okay, in terms of digital leadership it’s not a case of them saying, “We will let people order things online,” or “We’ll list where our stores are on the website,” but infusing everything from all angles to make it a true digital company. And allowing that approach to help them forward has also informed their product offering, has also informed their product base. Taking this approach has allowed their cool image in their company to really be refreshed among millennials, who are a key customer based for them, in terms of what they are looking at both online, in real life and what they’re buying at the end of the day.

**Implementing a Digital Strategy**

So what are the key pillars of an organization’s digital strategy? It’s similar to what you would think for other kinds of change management and we want to take a logical step by step approach, but also always be aware of new information and things that are coming in to be able to be agile and to be able to adapt to what’s going on in the real world.

So what does that process look like? It looks like first figuring out where you are. Where is the company? Where are they? What’s the current state of their digital transformation adoption? What things are in place? What things are not yet in place? What things would be good to be put in place within the medium to long-term and some immediate wins as well?

And a big part of that also is benchmarking best practice from both your own industry and other industries, so keeping an eye out for those examples or doing a bit of due diligence and having a specific project of saying, “What’s best practice in our industry and across industries as well?” And then setting that vision for the next one to three years. And that again, that’s the short–term wins and medium and long–term things that you want to be able to achieve.

One of the misconceptions or myths about digital is that there will be all quick wins or that it will be easy, that it’s free to set up, it’s cheap to set up. So we’ll get a little bit more into that later in the module but it’s important to get your vision set for the next three years in terms of what do you want to achieve with this. And then once you know what you want to achieve, what’s your proposed strategic approach? What do you want to do and why do you want to do it? And then how are you going to do that? What’s your phased plan to enable these things to happen? What are the resources that you need to be able to accomplish that? What’s already in place? What needs to be new?

And then how are you going to measure those outcomes? What are your projected outcomes and KPIs? Are there things that you think you’re likely to stick with? There are things that might change
along the way as you’re finding out more about how this program is progressing. Because remember that in this particular slide we’ve got a list from one to eight but there’s always in digital transformation an arrow from the eight that goes back to one, though in this case, maybe it doesn’t go back to one, maybe it goes a bit more back two, where we’re refining vision. And then also the last point on this slide is keeping in mind your timelines and next steps. Always thinking of what are your goals, what do you want to achieve, what’s the timescale in which you’d like to achieve them, and then how are you going to measure that?

So in talking about the last slide, I mentioned a few things, a few myths and misconceptions around digital strategy. It’s something that a lot of companies haven’t done before or have done bits of here and there, other people have done it. So it’s easy to have some misconceptions and part of what this talk wants to give you is other people’s experience that you can learn from as well. So some of the misconceptions are that it’s easy to take off the ground, there’ll be radical changes and fast results, that one size fits all. So we’re going to be talking about examples from other industries but things that you can learn and put into practice in your own business.

The last ones that we wanted to just cover up here are that social and digital maturity don’t matter. I think if you’re already listening to this module you maybe have a bit of interest in it already, but later we’re going to talk about making partnerships and winning over executive support from within your own organization. And you’re going to come up against one or all of these misconceptions and myths as you talk to those people. So you will come across people who say social and digital maturity don’t matter. So it’s important to be able to have some responses to these concerns that you get. Because in many ways they are a valid concern and you want to be able to anticipate those questions, and have those answers ready when somebody asks them to you in your own organization.

I think the last two, creating immediate impact and solving all marketing issues, kind of harken back to that first line of that you will have radical changes and that it is easy to take off the ground. So there are some different nuances in here but they all kind of revolve around the same thing.

So let’s cover off some consideration to take when implementing a digital strategy. The first is governance mitigates risk. With lots of clients I had worked with at Brunswick, the first question that clients would come up with was, what is the risk of engaging in this medium? And I think that something else that’s helpful to talk about with clients, so what’s the risk for not engaging in this medium? At the broader level, there’s the missing out on an entire base of consumers who are getting their information from digital channels.

And then on the closer to home level, there’s also the risk of not having employees have social media properties that are at the very least locked down and knowing what the risk is of not engaging in this medium. I had specific clients and contacts who didn’t have a presence on social media and didn’t have any guidelines, hadn’t engaged with their employees about what should you do, what shouldn’t you do. And as a result, external people had actually come in and set up fake profiles to be able to connect with other members of the company. So they’re the broader issues of risk of not taking advantage of an opportunity, and then the more close to home issues of not being aware of that landscape and taking proper precautions to lock things down if necessary.

So connected to that is the concept that training develop social capabilities. So understanding what’s safe, what’s not safe, what’s good for the company, what’s not good for the company, and enabling and empowering people to make those decisions on their own. Training is key and we’re going to get into that a little bit later in the talk.
The third consideration is that processes make behaviors repeatable. It is fantastic when there are wins, when there are short-term gains, and what is really fantastic is when there are processes in place to track, to measure, to be able to repeat those things, and also when mistakes are made to recognize what happened.

And that leads us to the last consideration is that measurement tracks results and best practice, which is absolutely key to being able to continually improve and iterate on the things that are both successful and address the things that aren’t successful.

**Digital Transformation**

So what does digital transformation mean? A lot of people when they think of digital transformation or digital communication, digital presence, think exclusively about social media and the outward facing things. That is absolutely true. So if you are a store, if you are an ecommerce company, the customer experience might mean taking those capabilities online, allowing them to open a whole... allowing your customers to have a whole new channel to be able to access you. That absolutely is a no brainer in terms of customer experience, but there are broader questions around how do you do that? And broader questions around how can digital transformation affect the company as a whole not just that consumer facing part of you? Not even just that corporate reputation facing part of you, as well.

So what are you doing to bring those things throughout the company, throughout operational process, and how are those things affecting your business model? I think if you look at some examples for how different companies have done these things, it’s really interesting to look at an ecommerce company like an Amazon or someone else that has an in-person store and then allows online ordering to look at somewhere where digital transformation has had a real effect on operational process. And to look at a look at a business where digital has completely transformed their business model.

So I just want to take a minute and talk about ecommerce for customer experience, about some issues in healthcare for operational process, and about media, in terms of the changing business model for how digital has transformed that business.

So take a look at customer experience. I, for example, I’m a huge fan of being able to source things online. It doesn’t mean that I don’t go to stores, it doesn’t mean I don’t still go to H&M. So before we move on from this slide I just want to take a bit of time to go into three examples from three different industries about what digital transformation has meant for those companies. So taking a look at customer experience, at the end of the day we’re all customers for one thing or another. And I think we’ve all experienced as well a very simple transformation where a store like H&M has a presence in-person and has also added to that a presence online. So simplifying what the customer is able to experience by being able to source the same products online as in the store, and also being able to source a wider range of things in some instances.

Taking a look at operational process, my core experience is really in health care, where health care obviously is an extremely long-standing industry with extremely embedded processes. And it is a bit slow to change, to be fair. But what we’re seeing now is great progress towards operational processes that are being transformed by digital. So not having to send a letter from your GP to a specialist from your primary care doctor to a specialist to be able to get an appointment, while changing that and transforming that process to make it quicker, to make it easier, to make it digital, which saves everybody time and cost. So these systems are being adopted in the U.S., they’re being adopted in UK, they’re being adopted all over the world. And it’s just things that are obvious, that are
being used in other industries and now that they are being used in health care are having a massive impact on operational process within that industry.

And I think something else that we’re really familiar with as well, as consumers of news, is how has digital transformation changed the business model of media. It wasn’t that long ago that we received newspapers to our houses, it wasn’t that long ago that we consumed news by reading it, by seeing it on TV, by talking to people at work. All of those things still happen. But I don’t think there’s one of us that hasn’t been touched by reading news on our own phone. By reading news online, by reading online papers. And the question for media and that industry is how do they go to where their consumers already are? And then how do they monetize that? How do they make that part of their business model? And some are doing that better than others and I think we can each tell which ones are doing well, which ones meet our needs, and which ones are we willing to pay for subscriptions for. So I think across all of these very different industries, digital transformation mean something very different.

So for your own industry, for your own business, it’s about looking at what other people are doing, learning from... what are the parts that work for them, what are the parts that might work for us, what can we learn? And making those things a part of your business at the core. Not just tacking on “we will also have a PDF of our newspaper on the website”, because that’s not what digital transformation means. What digital transformation means is redesigning that process, redesigning it for consumers, redesigning it for your revenues, redesigning it for your business model, of how can we take advantage of this, and how can we service our customers in the way that they want to be serviced; both inside the company, through operational processes, through things that might not directly touch consumers; and outside the company, things that they directly interact with on a daily basis.

So why is digital transformation important? In some of those previous examples we’ve talked about the importance of connectivity with customers, colleagues, and suppliers. And in the Burberry example, we talked about innovation of new products business models operating models. Some things that we haven’t touched on yet, but we’ll get to a bit later are automation and decision making.

By definition, digital allows you to take some of the work that people are doing in an analog paper-based way and automate some of that. Is it appropriate to automate 100% of it? Probably not. And we’ve seen some examples in the very recent past where Facebook had tried to automate, completely automate their top things that were trending and the result was not good. So there is a degree of automation that is available and should be taken advantage of, but to completely put things in the hands of automation without human oversight at least at this point is probably not the way to go, but who knows how things will go in the future.

This is also a really exciting area of medicine as well. So there are a lot of places in medicine where automation and digital-based transformation can have a huge impact. Are we at the stage where it’s going to completely replace doctors? Of course not. Two areas that we haven’t talked about yet much in our examples are automation and support and decision making. We’ve seen some interesting examples in the really recent past, within the past month or so where Facebook tried to completely automate the way that they choose topics for their trends in the upper right of their news feed and the result was not good. Entertaining for some but generally not good. So at the stage we’re at right now obviously automation can have an impact and can take away some of the manual analog activity that frankly people don’t need to be doing. But at this point we still need human oversight on quite a lot of things and I don’t think we’d want to completely abandon that for some time.
But there’s no question that it can automate a lot of the processes that we spend time on. And that’s
time, money, and resources in general. One area that I have intimate knowledge of where that is
going to have an impact and is in the process of getting there really is in medicine. Where there was
an article in Forbes maybe about a year or 18 months ago with quite an attention grabbing headline
of saying “Computers to replace 70% of what doctors do.” And a lot of people view that as a
negative that our doctors will be replaced by computers. Who wants to be treated by a computer?
But having been a doctor, having gone through medical school, I think that is an absolutely fantastic
thing. Because often, 70% of the things that we do can be done by someone else, can be
automated, can be streamlined so that we have more time to spend with our patients. We’re not
there yet.

There’s just an article in, I guess it was JAMA or another journal this week, putting diagnostic
computers more or less head to head against doctors and doctors still consistently outperformed
them. But I don’t think anyone would argue that both in medicine and lots of different sectors there is
a much broader role for automation, a lot of processes than we’re currently seeing.

The key is just how you execute that, how you put it into practice, and how you embed that within
the current system to learn, to get that data, to how to bring up that automation to a spot where it
actually can start replacing things. And then over time, how can that drop off and how can the
human interaction drop off to an appropriate level? And where can you deploy it out within your
organization for much greater impact?

So I think this is a really exciting area and we’re all learning along the way. We’re all learning from
different sectors, but it’s definitely somewhere it’s going somewhere in the future. But the thing that’s
here right now is decision making. How do you make decisions without data? I don’t understand it. A
lot of people seem to do it. But something that can have an impact today is having more information,
more data on which to base your decisions. And nothing sets you up for that better than digital
transformation, for both internal processes within your company and for external processes and
accessing external audiences.

So just formalizing that a bit more, MIT has come up with their nine elements of digital transformation,
and those same pillars that we’ve been talking about. So transforming customer experience,
transforming operational processes, and transforming business models.

Transforming customer experience, we’re breaking down into customer understanding, top-line
growth, and customer touch points. Customer touch points is a lot about what online ecommerce
gives us. And it also circles back to that customer understanding. It’s very difficult to judge in a store,
beyond footfall, how long people are spending, how many items are they looking at. By having that
customer touch point online you can access a deeper level of customer understanding for your
clients that can help you create better products for them. And can then underpin top line growth so
they’re all connected.

In terms of transforming operational processes, there are so many industries that will benefit from
process digitization which leads to worker enablement and performance management. Again, similar
to the customer experience it comes back to data. It comes back to understanding what’s going on
and then understanding where you can make that better. Where are some areas of your own
business doing better or worse than other areas? And then asking and answering that question of
“why is that?”

So if you’re talking about health care it might be: Well, why with a similar patient population is this
hospital massively outperforming this one? And there might be basic reasons that explain that, and
there might be some other things that are a bit under the surface. But the point is that when you
digitize processes you do enable workers to work in a different way, and you do enable some work
performance management to be able to get insights into how things are going. And that unlocks the
possibility to help things go better.

And in terms of transforming business models, MIT breaks down into digitally modified businesses,
new digital businesses, and digital globalization. And each of those concepts I think we see very
clearly in terms of how media is moving. Look at what the BBC is today versus what it was 20 years
ago. Look at what the Guardian, the New York Times are today versus what were 20 years ago and
try to imagine what they'll be 20 years from now.

**Digital Strategy Success**

So we've talked a lot about what it means to be a digital leader, what that looks like, and what you
should be trying to achieve while you're doing that program. So how do you know if your program is
going to be... how are you going to set yourself up so that program has the most likely chance of
success? And one of the most important things that you can do in any sort of transformation
program or change management program is set goals early on. It provides the purpose of why the
digital strategy is being set and informs what needs to be tracked, reported, and measured.

Something to take into account with your goals are to make sure that they are specific, measurable,
attainable, relevant and time based. Missing any one of these elements can mean that those goals
slip that other executives in the firm don’t understand the goals, that they're not able to see how
those goals are benefiting the business. And those things are really key for buy-in from within your
broader organization. If you have all of these bits but they're not measurable or that you've not set up
the right KPIs, or the KPIs that resonate with the people who are making decisions and supporting
your program from within your business, then you're unlikely to see that kind of long-standing
support that's going to be necessary for the success of your digital strategy.

And I've seen in companies that I've worked with a lot of enthusiasm up front but because that
measurement part wasn't there, because goals were maybe not so attainable, that enthusiasm drops
off over time because people are not seeing results. And that's because they're not seeing results in
the way that they're used to seeing results. So it's important that right at the beginning when you're
setting those goals, when you're putting together that blueprint of what are you going to do, why are
you going to do it, and how are you going to accomplish this, that those goals really are measurable
and attainable, and that those goals and that those KPIs are not just quantitative-based, that they're
qualitative-based as well, and that they have a reason of why they are important for your particular
business.

So sometimes, along the way, we've set goals. We've set goals early on and we have set KPIs, this is
what we want to achieve, and this is what success looks like. But in a rapidly-changing world and in
an area where our company probably doesn't have much of a presence or has an early presence
and is evolving, we're in the process of transforming them, it's going to be necessary to update and
to change those goals and KPIs. So what are those changes dependent on?

Those changes will be dependent on the state of the program, the changes in strategy to adapt to
market challenges, and changes in the strategy to adapt to shifts in the executive charter. If you're
doing a digital strategy, you know that you're not often left field, that you're not tacked on to
something on the side of the business. It's got to be integrated into the business and therefore those
things have to go with the flow of the business as well.
It doesn’t mean that you shift things easily or in the short-term or as the wind blows. But it does mean that you need to be aware that these goals and KPIs might shift. And to anticipate how are you going to do that and how are you, as the digital leader, going to stay clued in to the board, to those executive strategies, those executive charters that are of most importance to them, so that you can stay relevant, and that their program is going not only according to its own blueprint but also with the blueprint of the company; or else you’re going to run into problems with transformation and with the buy-in from all the people that are going to need to support you to have success and getting it adopted.
LESSON 2: BECOMING A DIGITAL LEADER
Establishing Personal Leadership

So, that brings us to the end of the first section that we’re talking about in a digital leadership process, the concepts. So let’s move on to section two, Becoming a Digital Leader. We want to touch on three aspects here, which the first is establishing personal leadership, the second, digital transformation support, and the third executive sponsorship.

So, establishing yourself as a digital leader, the key concept here is that in order to be an effective digital leader, you need to lead by example. What exactly does that mean? What are the qualities that are going to help you be an effective digital leader?

So, the first is thriving despite uncertainty. It’s a new area that everyone is getting into. There’s not a huge track record, but there’s enough that we can make some informed decisions about things. Focus on ideas that leapfrog ahead. You can learn this from looking at what other people have done. You can think creatively within your own organization, but having a focus rather than trying to do absolutely everything is key. Select your digital-era levers and start experimenting learning and iterating. And the key to winning at this is innovating faster than others. So it’s about knowing what best practice is, putting it into practice at your own company, and then learning from that to be able to innovate faster, to be able to leapfrog ahead. And that is what’s really core to having good processes and to having digital be infused throughout the company not just something that is tacked on to the side.

So, establishing yourself as a digital leader, what are some of the benefits of leading by example? What does that actually mean? How do you lead by example? Can you become a thought leader? What does it mean to become a thought leader?

So, a thought leader is someone who doesn’t read from an instruction sheet, is not someone who is selling, constantly trying to sell a product or sell a program or sell something that they personally want to be successful. They’re not really someone who’s selling anything at all. They’re someone who’s teaching. They’re someone that is sharing ideas, that is sharing experience for everybody’s benefit. They’re somebody that gives credit to other people, that nods to other examples. Because, really, if you’re a thought leader, what you’re doing is educating people. And when you’re educating people about the opportunities that are available through digital means for your company, then that’s value that you are adding to the people who are listening to you.

It’s a very different response from your audience to be selling them something which they listen to through a particular pair of earphones. People automatically will edit that message that they’re hearing, whether it’s your own employees about why they should be doing this program, or your own board about why they should be supporting this program with time and resource, or whether it’s customers in an external-facing environment. It’s really quite different to be a thought leader and to share ideas, to teach things, to share concepts than to be specifically selling a product. And that’s really a core concept of what it means and what’s important to personify as a digital leader. And that’s what really underpins leading by example.

So, what are some specific things that you can do to lead by example? At the very basic level, it’s creating fully-optimized profiles, building your network, sharing relevant information and publishing some self-written content or sharing some things that are relevant to your business. These are all actions that we would advise corporate clients of at Brunswick at the bare minimum. So it’s about enabling employees. It’s about enabling yourself to be fully a part of the digital world to be able to see what’s going on.
Digital Transformation Support

So, what are some aids for non-technical leaders? Whether you’re a non-technical leader yourself at the moment or something that you’re...or people that you’re working with that you’re trying to get on board are not quite at that stage.

There’s three concepts that make sense here, which is educating yourself, partnering with IT, and utilizing tools that are already out there.

So it may sometimes feel like you’re starting off in the wilderness if you’re at a company or if you yourself are at the stage where you’re not yet up and running, or are up and running and are not quite fully taking advantage of the things that are out there. But there are plenty of resources to help educate yourself on this, plenty of resources through these various modules and lectures and other opportunities online.

Partnering with IT, no doubt at most organizations IT has some things in place and will be able to help you put more things in place as well, whether that’s things that they have already done or things that you can talk to them about putting in place at the specific company. But it’s key to not be operating off in the wilderness but to be utilizing the resources and the tools that are already there within the company. Usually within lots of different areas, whether it’s communications, IT, marketing, perhaps even HR, there are kernels or perhaps well-established programs accessing digital means and digital communications that may not yet be connected together.

But it’s helpful for talking to particular non-technical leaders to show them what’s already available in the company, what people are already doing, and to connect those dots into something that’s a broader strategy. That will help you get the digital transformation support that you need for buy-in and not only just the resource, but really that buy-in from both more senior and less senior people at your company.

Executive Sponsorship

So, executive sponsor, we’ve talked about the people in different departments that might be able to help you, people who might be more senior to you or more junior to you that might be able to help you with this transformation program. And someone its really key to have on board with you is an executive sponsor, and what does that mean? Who is somebody that can be on your side, that can be on your team, and why do you need them? So, an effective executive sponsor is someone who is respected and has influence in the organization, that they understand those goals and outcomes for the business, not just for your transformation program, who understands internal politics within the company, who is going to be a winner, who might be a loser from something that you were trying to put in place, and how to mitigate those risks for the particular program and has a personal investment and interest in a digital transformation program moving forward.

So, what is it that that executive sponsor might do for you? We’ve broken it down into five key areas. Some of these things you might be able to do yourself. Some of these things might not be necessary at your company, or you might need support on every single one of them.

So, the first is championing digital transformation. Do we need it at the company? Why is it important? Should people even be interested or listening about this? If you don’t have that, whether you were able to drum up that support, or you’re working with an executive sponsor, if you don’t have that, getting your project off the ground, getting your transformation off the ground is going to
be a non-starter. It’s not going to happen. If people don’t realize and don’t really understand and buy in to why that’s important, you’re going to be facing an up-road battle the whole time.

So the second point, securing board approval and budget. It is fantastic to be able to re-jig your own resources and perhaps to be able to tap into those other departments within your company. But at the end of the day, you’re going to need some sort of budget and some sort of top-level buy-in to why you might be using other resources that could be deployed on other things. So having that senior buy-in to secure board approval and budget and to really understand why it’s important for the company is going to be really key.

Facilitating internal decision making, this is really connected to the second. You need that top-level buy-in. You need that budget. You need that support, and you need decisions to be made to be able to move forward. Because the easiest decision at an organization is usually to say, “Well, let’s keep going the way we are.” There’s very little risk in making that kind of decision. It’s a tougher decision for people who are not part of your digital transformation program to say, “Yeah. Let’s go ahead with this.” Because if you’re thinking about the successes or the failures that might fall directly onto them if it fails, that’s something that they might have to shoulder. Whereas if it’s success, you might take more of the credit for having that go forward. So having someone on your side to facilitate that internal decision making and helping communicate that success of this is success for everybody in the company can really help facilitate and move those things forward.

And not having that can be a huge blocker in getting anything to move forward at all. I’ve personally seen that in healthcare quite a lot, and frankly, I think it’s quite sad. I think corporate environments are moving quicker to that, and that’s something that makes me optimistic about how things are moving forward. I often ask people in medicine to look at how digital transformation has affected and has had a positive effect in corporate environments to help them with their internal decision making. So I hope it’s something that you’ll understand the weight and the importance of at your own organization.

And the last two are inviting key stakeholders to the table and helping remove major roadblocks. Again, all of these are slightly connected. It’s about breaking things out and saying, “How can we address these things in different ways?” But people like to be a part of the conversation. Nobody likes to be ambushed and say, “Here’s what we’re going to do, and here’s what you’re going to do to help make it happen.” They need to understand how digital transformation of the company is going to support their objectives and help meet their needs, especially if they are being asked to contribute any sort of time or resource or budget to that. And part of that, helping them understand, will help remove those major roadblocks. Because when people don’t understand, that’s when they tend to retreat and say, “No. Things are just fine the way they are.”

So, I think we talked about why it’s important to have an executive sponsor and what they might do for you. So how do you go about securing that? So, all of this, again, is underpinned by understanding, understanding the company’s priorities, their own priorities, what the challenges are, the reasons why they might say no. Understanding the short-term things, this year’s charter, and immediate priorities, and understanding and speak the language of people who are going to be making these decisions. This, all again, is connected to your role as a digital leader and making sure that you have a really strong vision of what is it that you want to achieve. Why is it that that’s important for the company? And why should anyone support you in doing this?

So, this conversation is not that different than other conversations that you need to have. It’s a different audience, and it’s talking to someone and getting them onside to help you unlock those other doors. But you’re going to need to be unlocking doors all along the way, and different priorities
will be important to different people. So when talking to your potential executive sponsor in how to secure them, what’s important is understanding their priorities, understanding the audience, and understanding those messages that are going to resonate with them specifically.

So, let's go into one specific area that might help you gain that executive support. How can you leverage data to help gain that support?

So, a couple points here are, quotes from experts can be effective, might not be effective, it depends who the experts are and what the industries are, and how receptive your potential sponsor will be to those people and those words. Something I have found has been really effective in driving that message home of, “What should you do? Why should you do it?” is industry data. So, we want to do this. This is why we want to do this. Perhaps other people have done this, and here's been the effect. Or other people have done this similar thing. It's maybe not a direct precedent, but this is what we want to do in a similar way. And here's some examples that we want to extrapolate from for the potential impact on the company.

Really, it’s similar if you’re making a business case for something. What you’re trying to do is demonstrate the ROI for them. What is the return on investment, even if it isn't costing any money or any budget? What is the return on investment for their redirecting resources or time to make your digital transformation project happen? And you're going to have to back that up. You're going to have to back it up with data. You're going to have to back it up with brand examples, hopefully from the same industry. Maybe if you’re one of the real innovators that’s out there, no one's done anything like this, it'll be a bit of a harder case to make. But then you'll have a first mover advantage, and you have to make that case, too. And, if available, looking at the company's own data, and that’s when something has happened, and it’s gone well. When something has happened, and it’s not gone well, what is that evidence that you are asking them to base their decision on of “We want to do this and why.”

That's how those conversations go well, when you come prepared, and when you come prepared with data that they accept. Not data or information that's totally left field for them, that they might say, “This doesn't apply to us,” or, “Well, that's only for them.” You've got to know the people that you're going to talk to, and you've got to know what their priorities are and what’s going to resonate with them. And if you come in with that data and with that evidence to back up why you want to do what it is that you want to do, then you're setting yourself up for a much greater chance of success.

So, executive sponsorship, very important, but they're not the only person who is going to be making decisions and is going to be determining whether your program is a success or not a success. And something that I have learned from my own personal experience, both in individual companies and working at consultancies, is that internal promotion drives momentum. Everybody has their own things they're working on. Everybody has their own things that are going well, that are not going well. It is your job to basically internally PR, what you want to do, why you want to do it and tying those outcomes back to company goals. Because digital is something that’s not done by someone off in a room on their own. It's something that's accepted by everybody. It’s something that when it’s successful is woven into the fabric, as we said, of the company. So using internal promotion to drive that momentum is really incredibly important, and the level of doing that will depend on your company culture as well.

So, some points that we've pulled out about that are continually acknowledge your executive sponsor’s support. Nothing happens by its own on digital, so give credit where credit is due. Sometimes give credit where credit is not due. Tying outcomes, as we said, again, back to the
company’s goals, people have to understand that this is important for the company. It’s not just a digital leader’s project that they’re working on on their own.

Reporting on business impact, that’s the same thing. It’s not just tying the outcomes of what will happen in the future. It’s about what has been the impact of this. And not just success, it can be things that have happened that have been good. It can be things that have happened that we can do better on and internally communicating those results. And there are lots of different ways to do that as well, again, which is dependent on the culture in your organization.

I’ve worked with a particular company that did an amazing job of communicating those results in their monthly newsletter which was avidly read and really respected by all of their employees. And that had a huge impact on driving some of the other elements that were critical to the success of their digital transformation campaign. So including things in that newsletter showed and showcased some of the leader employees that were really getting involved in that program and inspired lots of other people to come to brown bag lunches for how to set up their profiles of things, to come for sessions on how can I learn from digital initiatives to help drive some of the development from my business unit.

So, that’s just one example of internally communicating results and having champions within the company that can help promote what you’re doing. Because at the end of the day, if it remains a secret, or if it remains something that you are working on or that’s your project, it’s going to be a lot harder to get adopted into being sticky within the company.
LESSON 3: IMPLEMENTING A GLOBAL DIGITAL STRATEGY
So, what is your digital strategy blueprint? What are the clear parameters that you are identifying and defining, that are going to lead your development of your program, and then help you complete that circle and iterate back to make sure that it all stays on track, and is likely to be adopted and be a success?

So, the sections of that blueprint that you need to make sure you address are objectives: Why are you doing this? Why is it important for this business? Strategy of execution. How are you going to do this? And that’s a lot of what we’re going to get into in this particular section. Dedicated resources. We talked about having... drawing on resources that are already present in the company, and also, what kind of dedicated resources are you going to have at hand to help you make sure that everything is joined up, to make sure things are moving forward?

Clear internal communications. Critically important to get that buy-in from people in terms of what you’re doing, why you’re doing it, and really critically, how is it going to help them achieve their own objectives for their business units and for their own personal development? Continuous learning and training. Things that we’ve already talked about but must be in your digital strategy blueprint in order for it to be successful.

Accountability and reporting: Who is accountable? Who are they reporting to? And, what are the metrics that they’re reporting on? And, continuous optimization: How do you take those things that they are reporting and use them as a basis to get better, to improve, and to get some insights into the things that are working well and the things that aren’t working so well?

Digital Strategy Elements

Theory of Crossing the Chasm

So, implementing global digital strategy, crossing that chasm. I think we’ve all seen this curve before, starting out with early adopters and innovators, innovators coming first, early adopters coming second, and then going on to the broader groups of people within an organization or within a culture, that are going to accept and really adopt a new way of doing things. And, we’re defining that chasm as the space between the early adopters and the mainstream adopters that are picking that up.

So, often you will find at any organization, the innovators get it, the early adopters get it, they understand it’s a new way of doing things. They’re probably already doing it in other sections of their work, other sections of their personal lives, and understand the value. The key issue with crossing that chasm is talking about and characterizing that value to the people on the other side. How is this going to be something that helps them? How is this going to be something that is good for the business, rather than something that is taking up their already limited resources, rather than something that is just distraction?

And, that’s what your role is as a digital leader is, helping them understand, with the evidence, that this is the right thing for them to do. And if, as you’re collecting that evidence, it seems like maybe it won’t be the right thing to do, going back and refining that vision on their own, because then maybe your strategy isn’t the right strategy, or is not the right strategy for that business unit. At the end of the day, it’s all got to make sense to you before it makes sense to anyone that you are trying to convince should be doing this.
Stages of Digital Adoption

Let's talk about the four stages of organizational maturity, starting with grassroots. Grassroots will be those people that... those innovators, those early adopters who know that they want to do something... maybe they want to do the same thing as you, maybe they want to do something a little bit different, but you might be able to get them aligned if you talk to them and get them on-side, and help them accomplish the things that they want to accomplish for their areas of the business as well.

Section 2, or Stage 2 is about rationalization, and that goes back to having an evidence-based way of rationalizing, and selling that idea of, “This is what we want to do. This is why we want to do it, and this is going to be the impact on you.”

The third stage of organizational maturity is: Operationalization. And, what that really means is getting things up and running. Obviously that’s going to start with your strategy of, how is it that you’re going to do it, what are you going to do? Who’s going to do it? How are you going to measure it? But, there’s quite a big step from doing that original plan, getting the buy-in to be able to launch it, and then actually putting it into practice. And, that’s what we really mean by that third stage.

And then the fourth stage is widespread adoption. And, often there is an even bigger jump between three and four than there is between two and three. Sometimes, you know, if you’ve got that evidence, if you’ve got a few supporters on-side, you can get something up and running. If there’s not anything else going on in your company, you might be able to get something up and running, whether that’s internal, whether it’s a new operational process in-house, that’s great, but spreading of that innovation, that widespread adoption can often be the biggest hurdle, and that’s where you really might need to bring in that executive support that we talked about earlier.

So, you may or may not need that executive support in Stages 1, 2, & 3. But, if you’re really going for widespread adoption, then, for sure, you’re going to need it in Stage 4. So, you’re going to want to think about that as you’re planning things along the way, and just be conscious that you might be really optimistic, and you might be really super-psyched about what you’ve achieved by putting something into practice for Stage 3, but to get other people to adopt it might be as difficult, or sometimes even more difficult than getting that first bit off the ground.

Again, something that we see really often in medicine, whether it’s in the U.S. or the UK, is that somebody has an amazing pilot, someone has an amazing pilot that has used something digital, that has been put into practice, that’s had great results. And then, how do you get that innovation to spread? There’s a number of reasons why it might not spread. Some of them are good, some of them probably not so good. Some of the good reasons are that every organization is different, and every business unit within your organization is probably different as well, though hopefully joined with some sort of common culture.

So, something that people will often argue, “Well, that worked for this, but it’s definitely not going to work for this,” because you’ll meet that resistance, you’ll meet that risk-averse way of dealing with innovation and with change. So, these are things that are really important to be aware of. And then, you know, “The concept of my business unit is different from yours,” or, “Things don’t work like that here,” or, “We have a different way.”

Something else that might stand in the way of widespread adoption are, “Well, we have our own way of doing that,” or, “We’ve started our own thing over here. So, we don’t want to adopt what you’ve adopted. We’re doing it this way,” whether that way is digital or not. People will have vested interests
in what it is that they’ve developed. Whereas your digital transformation program might be your own thing, they might have something, as well, that’s their own thing.

So, as you’re looking at widespread adoption, be really sure to know really what’s out there, whether it’s within your own company or whether it’s within the broader industry. Something I do see in medicine is that one hospital, one area will run a pilot, and it will have gone really well. And, I’ve seen, you know, the reaction of, “Well, that worked for them. It’s not going to work for us,” or, “We want to do something new. We want to be innovative.” And, I think something to face head-on is that people often associate the term “innovation” with something new or something that they have done themselves, or a new way of doing it themselves. And, a little bit less, it’s not quite as sparkly, it’s not quite as sexy to say, “Well, it worked over there, so we’re going to do that, too.” And, as long as you’re aware of that likely reaction, depending on your industry and depending on your culture, it’s something that you can anticipate, it’s something that you can address, and it’s something that you need to lend with your messaging about bringing someone along on that journey to help them.

And, it goes back to the same principles of how you’re going to talk to your executive sponsor to get them on-side, of how you’re going to talk to other areas that you are trying to spread this... your digital approach to, of how you’re going to get them on-side. And, I know from experience that it’s often really difficult, and it’s not particularly easy.

So, it’s something to be aware of, and I hope that your organizations and industries can understand the direction that things are going and the importance of adopting these approaches, and I hope you can understand the importance of... that your program, that your transformation that you are trying to move forward is something that is the right fit, because if it’s not the right fit for those other business units, those other parts of the company, those other companies, however you spread it, they will recognize that as well.

So again, it’s about having your vision, but it’s about having enough flexibility in that vision to understand how these programs are going to impact those different areas, because that’s what is going to really affect whether you’re crossing that chasm from number three to number four.

**Grassroots Stage**

Let’s go into a little bit more detail about how you work with that grassroots level of crossing the chasm. So, we’ve broken this down into nine areas that we can take a look at and talk about in a little bit more detail.

The first is analyzing what’s already there, analyzing those grassroots, those people, those programs, those things that are already in place and finding change agents. Are there people in your own department that are going to help you champion things, help you move things forward, have new creative ideas, or have done things before and have that experience to take things forward for you? Are there people in other departments? Are there things that are already going on that you might want to amplify rather than starting something completely new?

So, these are all things that you really need to take the time to tease that out, and a lot of it comes from talking to people, a lot of it comes from you leading by example, practicing what you preach and, you know, paying attention to the other things that people are sharing to their internal PR. Are they sharing their wins and best practices? Are there things that you can work with? Are there things that they can work with for you?
So, number two, finding your customer evangelists. Really similar as well, I tend to think of the grassroots things as people in-house, a little bit more internal, and those customer evangelists might be people who are more external-facing, but it doesn’t necessarily have to be that way at all, either. Number three, increasing your team skillset.

So, again, that can be connected to you leading by example, increasing your skillset, and positioning yourself as that thought leader, as someone who is teaching people things. Why should people want to learn what you’re teaching? It’s positioning it as: “I’m helping you learn new things,” rather than, “I’m forcing you to do things in a new way, or do things my way.” Lending that tone in the right way is really important, and employees respond really well if you...most do if you’re working with them to try to increase their skillset.

Number four, establishing central governance. We’re going to talk in a little bit about the different structures of how digital can come about in your company, and there might not be any one right answer. There might be different structures within your own company or in different business units, but what is important, to have some kind of central governance that knows what’s going on so that you can do all of these things that we’re talking about, so that you can have a vision, so that you can capitalize on the things that are going on, so that you can learn from things that are going well and from things that aren’t going well, and that you can report on those things to the broader company.

Number five, launch a pilot test. Nobody is advocating completely taking your vision, your three-year vision and trying to make it happen in Year 1, because we all know that’s not going to be successful, but if you’re working at that grassroots stage, what is the first thing that you should do? So, where are you going to launch a pilot test? Who is going to be involved in that? Probably people that you’re talking about in the first step on this slide, you know, finding those change agents, maybe finding those customer evangelists as well. Involve them in your pilot test, and have the pilot be a mini version of what you want to do for your broader strategy, taking a look at your blueprint, you know, what’s the vision for that pilot? What’s the team for that pilot? What does success look like for that? And then, always having a mind to, how are you going to share that?

So, bringing us on to number six, how are you going to share those wins and best practice throughout the company so that people take a look at that pilot and say, “That went really well. Maybe we should do more of that,” or, “That went well. It’s not applicable to me, but I can see how that makes sense for them.” People are at different stages along their journey of understanding how digital transformation can have an impact on them and their business unit, and they might be right. They might be right, and that it’s not right for them at the moment, but it’s a longer-term process of what you’re going to be working with through your company.

So, always having in mind that... especially going back to crossing that chasm from three to four in that previous slide we were talking about of, how are you going to get people to know about what you’ve done, either through official channels or through not-official channels? Maybe it’s by empowering those change agents to talk about the pilot, with other colleagues or about other things, so thinking creatively about how are you going to share those wins and that best practice throughout the company?

And, part of that, you know, how are you going to share that? What exactly are you going to be sharing is connected to number seven, identifying those basic KPIs. What is it that you’re going to share? “We ran a program, and this is what success means, or, this is not what success means?” You’ve got to really kind of dig into those things that you want to share.
And again, knowing your audience: What is going to resonate with people for what success looks like, if you’re trying to win them on-side that, “This should be something we should do more broadly within the company.” Not everything goes well in pilots. That’s why we have pilots, and don’t launch things throughout the whole company immediately. So, if you fail, fail quickly. And, that is also connected to those KPIs. So, you don’t just do an entire project and then only afterwards evaluate and look back and see how things are going. Because we have the ability to see how things are going along the way with most digital things, that’s why it makes a lot of sense to be trying to be tracking those KPIs, to set those goals and KPIs upfront so that we can see how things are going along the way, if you want to pull that plug a little bit earlier, or redirect, or iterate in a different way about being agile.

Again, coming back to medicine, this is not really a new idea. If you’re doing a medical study, you are tracking things along the way, and, of course, there’ll be analysis at the end, but just for safety reasons, you’re tracking things along the way. And, there have been many cases where... or studies where pilots were stopped because things were not going the way that they should be early on. So, this is something that we can learn from other industries, we can learn from medicine, just as a way to say, “We don’t know what the outcome is going to be. We’d like to think it’s going to be this, but we’re going to track it along the way to make sure that things are going the way that we hoped they do go.”

So, if you fail, fail quickly, and know what is going to define that failure or define success. And, probably something that goes across all of these, but, ask for advice from peers, so people have great ideas, people who work in the same company you do, or if they work in other companies, maybe they do a similar position to you or had similar experiences, and they’ll have seen good things and they’ll have seen bad things.

So, get that feedback. Take it on board, whether it’s positive or negative, and try to leverage all of that information for, how are you going to be most likely to be successful in what it is that you’re trying to do.

Rationalization Stage

So, that second stage was “Rationalization.” So, what is it that you’re going to do? Once you’ve maybe done this pilot, you’ve done that grassroots step, and built your foundation, how are you going to go to that next step to start growing it to be a bit bigger? So, build a bigger business case based on the pilot.

Now, one of the things that we talked about earlier was, when you’re trying to win over executive support, is go in with data. So, what kind of data is better or perhaps more convincing than going in with the data of a pilot in your specific company that you’ve done? And, hopefully that data is good, and there is a really strong evidence-based case for why you want to take that through in the rest of the company, what that might look like, and what might be the ROI for that for the company?

Number two, gradual transformation and integration. Just because you’ve had a successful pilot doesn’t mean that you necessarily want to tip all of the other dominoes all at the same time. It might not be the right time for those business units, for those areas of the company, but it’s part of your role as the digital leader to say, “Well, what is the next area that would make sense for this?” That’s part of the vision. That’s part of the strategy. And, going for the lower-hanging fruit, going for the areas where it’s most likely to be adopted, and have an impact, and be successful, and leaving the ones where it’s going to be harder or might not even have an impact for later or maybe not at all, if it

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doesn’t make sense for them. But, that really is part of your role of: How do you engineer that gradual transformation and integration, and how do you manage that?

So, there are things for you to do ahead of time before you do things. There are things for you to do in the middle as you are getting these things integrated gradually, and then there’s always the future vision, as well, that you’re thinking of for the longer-term.

Partner cross-functionality. This is something we’ve also brought up before that’s like, what are going to be the things that are good for partners, that are going to help them, that are going to help them achieve their business objective? So, this is something to have in mind as you are trying to integrate, and as you’re considering the different areas of the business that might benefit from these changes as you’re going along. And, how are you going to integrate?

Part of that is number four, establishing clear roles and responsibilities. When something is everybody’s responsibility, it’s often no one’s responsibility. So, establishing clear roles and responsibilities can help take those things forward, to help hold people accountable, but not in a negative way, to help empower them, to do things that they might like to do, and that’s also part of finding... building your team, and finding the right people to take things forward for you.

Providing central infrastructure, number five. This is something that goes back to some points we’ve talked about earlier as well. They’re all interconnected, and it’s really helpful to break them out. But, providing central infrastructure is positioning yourself as the leader. It’s having guidelines for employees’ online presence, but most importantly, it’s having a place for people to go to ask their questions, and to go to understand what the plan is, and to understand who is in charge of taking this forward, and who they can come to with their concerns, because very often when transformation programs fail, it’s because people feel something has been imposed upon them by someone external, in one way or another, either external to the company or external to their team, and they don’t have a way to feedback those concerns or to tell them, “Well, why is it not working for our department?”

So, providing that central infrastructure helps in the push-way of telling people, you know, “What we’re going to do, why we’re going to do it,” but it also helps with the information coming back of why things are going well, why things are not going well, and what’s going to work and what’s not going to work for a certain department. And, people need to know that. People need to know who is in charge of things, so that they can come to you.

And, the last point on this, the rationalization stage, is keep trying new things, not, keep trying things willy-nilly without any kind of evidence base. That’s not the way we’ve been talking about making decisions or introducing things, but keep trying new things in a strategic way; in a way that has a proper foundation to be introduced, and has a proper way of tracking and monitoring if things are successful.

And, that doesn’t need to be really onerous and completely data-driven. It could be as simple as providing that central infrastructure and giving employees a place to come back to give feedback.

**Operationalization Stage**

So, stage three, Operationalization Stage of Maturity. So again, lots of things to continue to talk about within this stage. So this is where things are up and running, you’ve done your grassroot bits, you have done your rationalization bits, people are on board, you’re starting to put it into practice at the
company. Some people might think that your battle is over here, but I can tell you from experience, it’s often just beginning.

So, what are some things that we want to get into a little bit more detail on here? So, we want to talk about each one of them in detail, but let’s just talk about a few of them. So, focus on efforts, create a solid content pipeline, scale central infrastructure, refine your metrics, manage budget smartly, scale the program across the business, shamelessly promote success, report regularly, and recognize employees.

So, let’s start with talking about number two, create a solid content pipeline. Most of you guys will probably be consumers of digital content, in one way or another. And, I think that we have all gotten really used to things being pushed at us. So, you need to have a solid content pipeline, so that you are ready to push things at your audience. And, in order to do that, you need to take into account: who is your audience, what is it, what kind of content are they consuming, what are the other people putting out that sort of content, and how can we plan ahead to keep that content stacked up, so that it’s ready to come out, and also relevant?

So, something that’s really useful in creating a solid content pipeline, it doesn’t mean creating a concrete content pipeline that’s immovable. An approach I often take with clients and companies is to say, “What are the messages that you would like to get across to the people that are consuming this content? What do you want to be known for? What do you want to be famous for with this audience?” And, distributing things throughout your content pipeline that help reinforce those messages.

Often, it’s things that you’re already doing anyway, but should be a bit more publicized to the outside world, or to the inside world, if we’re talking about internal audiences. And then it’s about leaving space in that content pipeline to fill it in with other opportunistic things. So, is there something going on in the news that you would like to respond to, has something happened in the company or to a competitor that you would like to respond to?

So, keeping things fresh, almost thinking of yourself as a media outlet, but not with the same kind of pressure to have everything be 100% news driven, but landing somewhere in the middle. Having a controlled content pipeline that is solid, that goes out several weeks or months, in case your resources that is managing that pipeline is pulled onto something else, that doesn’t just stop and dry up. Because in the earlier days of social media, where corporates were sort of getting involved a bit more, you see a lot of things that went up really quickly, and then you can very obviously tell that somebody has moved on, or someone has been pulled onto a new project, or that intern left, or somebody else didn’t like that project. And it’s quite apparent to the outside world what’s happened.

You can argue, how much of an impact does it have? We can argue, you know, about those specifics, but one thing that’s really important is making sure that you have that leeway, that lead time on your content pipeline, so that if things happen, you’re not only working a few days, or even a few weeks in advance. So, trying to get that out into the future.

So, let’s talk about refining your metrics as well. You want to talk about quantitative metrics, perhaps, and you also want to talk about qualitative metrics. Or can you track, who are the people who are reading the things that you’re putting out? Are they internal emails for your employees, because you’re working around employee engagement? Those are things that are really easy to track, and really easy to see. Are people reading the email, are people going to the links that are in the email, and then are there ways that you can track within your company if they’re putting those things into practice? What are other metrics? If your other metrics are purely about your reach as a company
and reaching as many people as possible, then they might be slightly more quantitative metrics. It depends, and those are things that you're going to work out in this space of your digital maturity.

Managing your budget smartly is important, because you can spend lots of money, you can spend a little bit of money, you can spend lots of time, you can spend a little bit of time on any of these things. So, it goes back to how are you going to define success, and what resources do you want to put behind that? Where are you going to start your pilot, how much is that going to cost, how do you plan to scale it? And then, are you putting the budget behind the things that people care about?

And the last thing that I wanted to touch on, in detail, in this slide, is reporting regularly. You'll have such a wealth of data from the things that you're doing, from the feedback you're doing, if you've set your goals and your KPIs up properly. People will want to know how you're doing. So there'll be lots of programs in your company that are trying to do things differently, or that are reporting on stuff. And you can leverage the way that you're going to have access to all kinds of data, real-time or near-time, to say, “Well, how is this going?” And to say, “Well, even if this is not going well, we know that this is going on, and this is what we're going to do to change it,” and then report on that.

So I think there's a lot that you can do for these things, but people like to know what's going on. Shamelessly promote your success stories, talk about the things that aren't going well, that you want to do better, either with your team, or the people that are supporting you. And help turn that stage where it's now up and running, into something where it can be up and running better, because if you don't put those things into practice into this stage, where things are churning away, you're going to find it really difficult to move onto the next stage, which is widespread adoption.

**Widespread Adoption Stage**

So, we talked a little bit before about how going from stage three, that operationalization, to widespread adoption can be really difficult. But if you think about those principals we talked about, in operationalization, it will make your job easier when you're going to widespread adoption.

So, when you're talking about other business units, or other areas in your company, that are potentially going to be adopting this, again, it's important to understand at the strategy phase, you know, at that early phase, to clue them in about what you're doing. They may not want to be massively involved, they probably have their own priorities. But, they will feel as if they've been taken along for the journey a bit more, if you let them know, you know, you're doing this pilot here, here is what we hope to get from it, and there might be something useful in it for you guys, somewhere down the line.

People like to be included, and like to have a heads-up, to have their expectations managed as well, just like you would if somebody was working on something that might someday apply to you. So, include them at the strategy phase, if you can, even if it's just as a heads-up, to let them know what's going on.

So, make sure that the things that you have put in place are easily replicated, and can have some standardized metrics. People will often say, “That's great for you, glad it went so well, but, it's just not going to work here.” And, if you can think about, and have a little bit of insight into, well, how do things work there, then you're going to be able to design your processes better, when you're trying to make them replicable, so that people can people can pick something up and put it into practice a bit easier than having to reinvent the wheel.
And the same goes for metrics. The metrics might not be exactly the same from one unit to another, or they might be, but trying to have something that applies to all, or by trying to anticipate what people are going to say is important to them, and being able to customize those metrics to what is important for that business unit, will help them move towards adopting it, rather than saying, “It doesn’t work for us.”

Moving on to number three, would be global adoption, where things are spread throughout the company, and number four, where it’s everybody’s job. So, think about global adoption in a new way of doing things. For example, people might have been used to managing their own customers, their own relationships, in their own way. In different business units, in different teams, I know I’ve worked with companies, and I personally have used the good old spread sheet to do these things, and it works really well, for my tiny little bit of the business.

But, you know, it doesn’t work so well when someone else might be reaching out to that contact, and they don’t know that I know them, or they don’t know they’ve already been asked to get involved in something. And then it hurts our company to approach, you know, this potential customer, or this external lead, this person we have a relationship with, because they know that we don’t have a joined up way of knowing who they are, and how they interact with our company.

So, a system that might work really for well for individual teams, or individual business units, separately, can work better, and can work better for the company, and therefore better for everyone, if it’s globally adopted. And the kinds of things that I’m thinking about are more global, in this particular example, are more global examples of CRM systems, of managing those relationships. I’ve had experiences where I’ve been, you know, in deep conversations about a potential partner, of supporting one of the innovation competitions I run for Cambridge. And then someone else has approached them, connected to the project, has approached them for something else, and had no idea that we were already in conversations. And it would help us look much more joined up if we’d had something like Salesforce, or something like Insightly, or another CRM system, where there’s a system for how we manage those relationships. And it’s not enough just to have that system, but to really have it be adopted.

So, number three is not global, it’s there to use it, if you want to. Number three is really global adoption. And that can be tricky, because you are trying to change the way people work. I, frankly, like using my little spreadsheet with my contacts, because that works for me. Or even if it’s small, having things in my head, it works for me, it’s quicker. But if we’re really talking about, you know, being a mature company that really transforms and uses the digital tools that people have to offer, that is a great example. And it’s not unique to a project that I’m working on with Cambridge. I think a lot of us have had that at our companies. And it’s about telling those stories, and about saying, or even asking the questions, “Has there been a time when something like this would have been useful to you?” And trying to help people migrate into using those tools that may already be present at the company. And that comes down to it being everyone’s job, as well.

**Building Digital Teams**

So let’s talk a little bit about digital teams. We’ve just mentioned that some things are everybody’s job. But obviously, everybody has different jobs. What are the jobs of the people on a digital team? What does that look like? I think in the early days of social media, it was very much, sort of, “The young people get it. And, you know, I’m not sure this is a fad. It’s taking a lot of time.” And then, over time, as we’ve seen massive amounts of customers, of consumers, consuming their information about our companies and about our businesses online, it’s become really apparent that we need to build a team that is permanent, that has a broad experience, and that is going to be able to deal with
the emerging landscape that we’re seeing out there in a responsive, yet experienced and professional way.

So we can take a little bit closer look at this diagram, and... which splits things into internal focus, external focus, and shared resources. So an internal focus is going to be talking about things that are obviously going on inside the company, which will be quite different from... may be quite different from those people on the team who have an external focus. So we’re talking about social media here. And the really interesting thing about social media is that it’s a two-way street. It’s not Web 1.0, where you have a static website that you maybe update once a year or with your quarterly results and put a PDF of your annual report, and that’s where people can go to for information on your company. Social media is very much about you talking as a company in an engaged way, and also listening.

So the first step that a lot of people will do and a lot of people will put into practice, in terms of this external focus, is putting in place that listening function. So what are people saying about our company? What are people saying about our competitors? Are people pretending to be our company, which is something that I have seen before? So getting that listening function and getting the tone of those conversations, and then being able to pull all of these things together, the internal focus, the external focus, and the shared resources to come back to then what will be our voice to the external world as well.

So how should you structure your social media? It depends on the company, and it depends on what it is that you’re trying to achieve. If you are looking at... This is not really actually only about social media. This is actually more about the digital things that you’re putting in place, and social media is only one small part of that. So if the first area that you are looking at a digital transformation in your company is strictly about communications or strictly about CRM, or strictly about something financial. It might be something as simple as the way you invoice and the way you track those things to get more insights and analysis out of that. Something centralized might make sense for you, where you have somebody who’s in charge of that. It might be you as the digital leader. And then they are dictating to particular other leaders of what needs to be done and how things need to be done. And that might be an absolutely wonderful, effective way of doing that. Quite different from something like a holistic model, where everyone is on equal footing. Everyone has a responsibility. Everyone is empowered. It depends what the function is and what sort of digital thing you are talking about.

Hub and spoke is something that I’ve helped companies put in place themselves, where there is a central person. It can be quite similar to centralized sometimes. But there’s a central person, the digital leader, who’s in charge of the vision, who’s in charge of the tone, who’s in charge of the strategy. “What do we want to achieve with this sort of transformation and how are we going to do it?” And then empowers other leaders throughout business units in the company to manage that within their own spheres. That can be more effective than having one centralized person do it. Because someone in accounting might say, “Well, you don’t understand how it works here,” and someone in HR might be saying, “Well, you don’t understand how it works here either.” So having the same person in charge of those can sometimes be difficult. But it can be effective for it to have a central digital leader, put champions in each of those departments to lead those things, and to be able to be flexible, to be able to be responsive to the cultures that might be going on in those different business units, in those different parts of the company.

Something that I have worked with in a holistic manner is some of the startups that I’ve been involved in. So I was involved in a startup called BioBeats that’s just raised about $2.3 million to continue our
work, which was merging healthcare and entertainment. And they’ve moved on to providing breathing programs to address stress and anxiety in the corporate environment. And we were a small team. It didn’t make any sense for us to have any of these different structures, because there were only about six or seven of us at the time when I was leading them as Chief Medical Officer. So we had a holistic approach to that digital… not really transformation, because I guess we really started there as a startup, but to our digital approach as a company, where we were all on social media. We were all going to events and talking about things. We were all seeing how was best for us to communicate from one to another. We didn’t like talking through email, because we didn’t want our inboxes clogged up. So we found another way to talk to each other about the things in our daily workflows. You know, we set up different things.

Some of them didn’t work. We were talking on HipChat. That worked quite well. We tried to do other things in Google Docs. That didn’t work well for us. But it was very much a holistic approach, where we ended up finding out the best way for us to work digitally and, which tools are we going to use that help us achieve what it is that we want to achieve, which is work together as much as possible, even though we were often in separate places, and keeping each other informed and in putting that face out to the outside world as well. Because the time when I was involved was quite early-stage. We hadn’t raised that much at all. I think we’d raised probably about $200,000 or $300,000 to work on what we were working on. And it was important for us to have a strong digital presence, for us to have... to develop a reputation. So that when it came time for the team to raise that $2.3 million that they raised recently, that people knew who they are as a company. And that was something that we needed to do in a holistic way.

It wasn’t just that one person was in charge of that. There was one person who was kind of leading that vision and saying, “Well, from my experience, I think this is what we might want to do.” But we all took responsibility for adopting that and putting it into practice. Because as a small team, you can’t have people that aren’t playing along. You can’t have one person on email and just five other people talking somewhere else. So in some ways, that small team helped us all get training together, and they’ve achieved some great things since then.

But again, every organization is different. I’ve also worked in big offices where... not even big offices, medium offices, where you’ll be sitting right next to someone and they email you. That I don’t get. So it doesn’t all have to be digital. Some of it can be analog talking. But it all... the point is that whatever organizational structure you are going for should reflect the culture of your organization and what it is that you are trying to achieve. But here are some examples. So have a think and see which one might work best for you.

**Training Considerations**

So digital teams, creating training programs. So not everybody is a complete digital whiz, and I don’t think anyone can really say off the bat that they know everything, because everything is so rapidly changing. So what are the points, like why would you want to create a training program, and how are you going to do that? What are the important things to consider when you’re putting together a training program for your employees, either for your team or for the people that you’re trying to convince throughout your company, that your digital transformation project is the right thing to do?

So four things that we want to call out here. One is improving employee performance, then ensuring consistency, improving employee satisfaction, and addressing weaknesses. So improving employee performance can be interpreted in lots of different ways. I think at the very... the most foundational way is often when you’ll talk to people, you know, at that grassroots sort of stage or talk to people within your company, they will tell you what things will make their lives easier. When I talk to doctors
or nurses, they don’t want to be sending loads of paper things and reviewing lots of things. They
don’t want to necessarily work the way it is that they’re working. But that’s the system that they have
to work in and they optimize their performance within that system.

But if you can change the system, which sounds quite scary and quite extreme, but if you can
improve the system, they will often tell you how that could improve employee performance. “So I
have to do X. Actually, if I had to do it this way, you know, it could be a little bit more like Y and that
would make it work a little bit better.” You can learn about removing barriers. You can learn about
how...they can tell you how things could improve their performances.

At a second level, it’s often not so easy, and people like to work the way they’re working. They know
how to do it. And as soon as you come in and try to change things, whether it’s digital or any other
way, in the short-term it creates more work for them. So people don’t like change.

There was a system that I was working with when I was a medical student at Columbia, where it was
trying to check... it was trying to avoid medication interactions or errors, prescribing errors by
physicians. So you put your order into the computer... your order for the prescription into the
computer, and, you know, it gets sent to the hospital pharmacy and this is how you do the order. At
least, it’s an improvement from you don’t have to write it on a piece of paper. Who knows what can
happen to that paper? And what the system was supposed to do was to check that a particular
patient wasn’t getting, you know, a medication that could interact with what you’re trying to
prescribe. Also, to check that, you know, you’re prescribing 100 milligrams, but actually you meant to
write 10, because 100 doesn’t make any sense. So just kind of cross-checking against these things.
And there was... I remember one particular instance, where if you tried to do something that the
machine didn’t like... the computer didn’t like, you know, a little box pops up and says, you know,
“Basically you’re not supposed to do this,” or, “Why is it that you’re doing this?” And you have to put
in some sort of answer for that. And the resident I was working with typed in, “Because I’m the
doctor and you’re the computer. That’s why.” You know, and it smashed the Return key and moves
on with things.

So just taking into account that some things that are supposed to make people’s lives easier, that
particular system was supposed to make your life as a doctor easier by flagging out things that you
might have missed, by helping you perform better. It was supposed to improve your performance.
But if you have to put an explanation every time you want to do something, that there are
parameters...I don’t know how their parameters were set, you know, that’s something that is at the
end of the day going to end up really annoying people.

So I think it’s important to have things in mind or to put things in place that you think will improve
employee performance. But then, also always to complete that circle and to ask them about it. So
that particular system was something that was put in place by an external vendor. I don’t know what
happened to it, actually. I’m sure in some ways it’s still up and running, because I think it’s a great
idea.

But the point of this story, the point of telling this little anecdote is sometimes things that you think
can improve employee performance might just end up putting additional barriers, or have unintended
consequences. So it’s important to talk to people about those things if you’re in a training program.
So improving employee satisfaction is quite connected to that as well, and it’s again something that
you’ll want to be able to get feedback from your people as you’re putting things in place.

If you’re starting to think about how you need to build your digital team, you want to consider some
of the following resources that you would need to create a training program. Some of them are going
to be must-haves and some of them might be some nice-to-haves, but these are all things that you probably want to consider.

The first will be a training manager. That’s definitely a must-have. Who is the person that’s going to lead the training? What are they going to talk about? What kind of background are they going to do and how are they going to reach those employees? Is it going to be external people that you are bringing in? Is it going to be someone from the team that you trained in a Train-the-Trainer sort of way? So you’ll need definitely some sort of training manager but how exactly you do that, it will be completely up to you.

And then you need team members to lead. Who are going to be the first people that you think about when you’re creating your... that you think about reaching when you’re creating your training program? Probably it’s going to be initially the people that are working in your pilot. But as you move on, you’re going to need to think about, well, who are you prioritizing, giving that training to. Are you going to specifically reach out to people to say, “Well, we’re starting to do something in your business unit. Do you want this kind of training?” Or are you going to make it more of a they can come to you sort of way and say, “We’re having a session at lunch or we’re having this evening session, or we’re having this session now. Whoever wants to come can come,” and see who comes to you. Again, there’s lots of different ways to do this and it’s going to be up to you to say what’s going to be best for your business and for your culture.

And then do you want to have a budget to cover external classes and a budget to cover industry experts? These are all things... these are both things that can be really effective in trying to get a digital transformation program both off the ground and growing within the company. What you want to avoid is having it tied too much to you as an individual and someone saying, “Well, that’s so and so’s program.” So, because what can happen with that is that people think that you’re pushing the program because that’s what you want to achieve, that’s what you think is the best thing. So by getting in third-parties, whether it’s external classes or industry experts to come in and address stuff, is a way to help communicate to your employees, to your team members that you’re not the only one who’s saying this. They probably know that already. But it’s a way of saying, “Well, this really is best practice”. And who doesn’t want to be a part of best practice?

So if you have the budget for those things, that’s a really good way to think about using those resources. Something that may or may not be in place for you is infrastructure and equipment. That can be something as simple as servers to run things or it can be infrastructure in terms of software that you need to purchase or software-as-a-service, something like Salesforce that we were talking about in terms of CRM or any of the other services that are out there. Or things that can be used in finance like invoicing and better ways to manage that in a way that can be... that can open itself to being unlocked with the digital analysis.

And the final is partners, so that can be connected to infrastructure as well, of who are the partners that you’re going to need to help you do this, and then how can you incorporate that in the training program. Are they partners that you want to bring into the training program? Are they the partners within your company that can help you create the training program?

And the same can be true of the people managing the infrastructure as well. So, it’s about trying to gauge what are people going to need to understand in order to make this program happen. What are the things that you know as a digital leader that they also need to know? They might not need to know everything that you know about it, but what are the things that you know that they also need to know to be able to make this program a success? And how do you incorporate that into the training?
Types of Training

What are some considerations when delivering offline training? Some training can take place during work. Some training can take place during away days or dedicated training days. And some training can take place just with offline demonstrations. Some might be more straightforward than others.

So, here are some considerations that we had pulled out that you will want to think over in delivering that offline training to your teams within your company. One is to provide clear demonstrations. Let them know what good looks like. Do they have profile set up? Are they locked down? Are they aware of the guidelines? Let them know what good looks like in terms of a LinkedIn page.

Second, organizing training days to teach digital transformation best practice. Think about who are the people who are most likely to benefit from this? Who is going to want to come? Who might need to come if they don’t necessarily want to come? How can you create value for them in coming from this? How can you make that training relevant? How will they experience this and come away from it and say, “I really learned a lot or I have to teach, or I’ve got to tell so and so about this.” And a lot of that training will be relevant if you divide it by levels of technical competency.

It doesn’t work particularly well if you take someone who is really active on social media, who is reaching out, maybe even generating new business through Linkedin, and put them with someone who doesn’t see the value, who doesn’t want to engage and only sees it as a risk. Sometimes that might be okay actually. It depends what exactly it is that you’re trying to achieve with that training. So just keep that in mind when you are designing that of what’s the content you are going to deliver and what’s the group that you’re going to deliver that to?

Establishing a Train-the-Trainer program is usually really effective in organizations, but there’s a limit to how effective that is. Because you will often reach out to people who are like you and who you already know. So you’re maybe a bit preaching to the choir on these kind of things and you’d also need to have this be part of the strategy, part of the ecosystem of getting people up to speed but not depending entirely on a Train-the-Trainer program.

But there are definitely ways that you can amplify your own efforts and your own resource by having champions within the company to do that. And creating brown bag lunch type programs of, you know, having a bit of a pull and saying, “We’re going to talk about this and join if you want to.” Like those often can... those kinds of programs can help you identify the people who can be your trainers in the end and who will be more likely to go out because they are the ones who have been proactive to find out about this.

So it’s not to say that any one of these particular bullet points is the thing to do. And the balance between these different things will be determined by the culture of your company. And that’s something that you can answer.

In addition to offline training, you can offer online training as well. So what are the characteristics that are going to make online training something that people actually takes something away from? I think we all probably have also watched some ineffective online training. I know I have. And here are some things to bear in mind, some qualities of online training that can help it be more successful for what it is that you’re trying to get across.

So making it short and informative, keep it to the point. People don’t like to watch long videos, so I’ll move on. Utilizing an easy-to-follow format. So, not making things super long and super detailed, cutting to the chase about stuff, but also having it available so that people can explore into greater
detail things that they might want to know. That might just be as simple as for further information you can go to these places, but trying to keep it tailored to the audience.

The one thing to remember with online training is that you’re creating something without... you’re delivering something without your class in the room. So trying to make it as applicable to everyone and keeping that balance between the right level of detail and also maintaining interest along the way. So, finding an engaging and knowledgeable presenter is also really important. It depends again what your topic is. If it’s something very simple about setting up a LinkedIn page, then that’s something that I think that you can keep short and snappy. You can deliver it and keep it, you know, quite succinct. If it’s something that’s more detailed, that’s something more about your industry, that’s something more about, you know, broader digital transformation, you’re going to need to find somebody either within the company or an external expert that can speak about that with authority, so that people understand... that people are willing to accept the messages that they are talking about.

So, designing impactful test questions. People love to watch videos. People also get really distracted when they’re watching videos or reading things. So something throughout all levels of education that works really well is testing that knowledge. So I’ve worked with some online education companies, in healthcare and other sectors. And that is always a really critical part of, you know, how are you going to get people to retain this information. But not just how are you going to get them to retain the information, how are you... are you going to get some extra data from that? So, you can look at their test questions to see what kinds of things are they retaining but also just as a way to keep people engaged to. Inject some proactive parts into what can otherwise be a quite passive way of receiving information.

And the last point... the last consideration for delivering online training is to refresh the training. It’s a fast-moving environment. Some things will be basic and you might want to keep the same but other things need to be refreshed. And even the things that you want to keep the same, you would benefit from refreshing. And it’s up to you how often you might want to do that. Some important skills to take into account when building your digital team are what we have listed in this pyramid here. So we’re pulling out thought leadership as something that we really see for you as the digital leader as someone who’s setting that vision, who is talking about ideas. Not talking about, “Well, you have to do this program because,” or you know, the very specifics. But talking about the vision and what’s possible if we pursue this line of what is that we’re working on.

And a lot of that can be underpinned by case studies, that you as the digital leader and anyone else on the team can talk about as well. So, it could be case studies from within your own company. Those are things, you know, talking about the pilot that you’ve done. Talking about something that someone else, another place in the company has done that you want to try to replicate, championing other good things that are going on so that they can help that... to help to be adopted. Case studies from other companies within your industry and case studies from across industries that can be relevant to you and your business. And then, you know, important skills to have on that digital team, product, service and offering.

At the end of the day, it’s great to be a thought leader. It’s great to have a vision. It’s great to talk about things that other people have done in case studies. But it’s got to be relevant to your business. So if people in media... if people at the Guardian or BBC were only talking about thought leadership and case studies of small things that people have done but didn’t really have people on the team or to really bring it back to the product, the service, and the offering, they wouldn’t be the kinds of companies they are today where digital is completely embedded as part of their business.
And that also brings it to the bottom of the pyramid in terms of brand advertising and messaging. So the Guardian is not just a newspaper. The Guardian is – I might be wrong on the specifics of this but, as the biggest source of online news globally – not just a newspaper from England. So I think having all of those skills within your digital team, whether it’s within your specific team or whether you’re tapped into those broader resources in the company and having them built in, so they’re part of your extended team, is going to be critical to transformation being accepted as part of the company and really being adopted and stuck in, so that it has an impact on the business.

**Facilitating Collaboration**

In addition to having employees talk about case studies, talk about things that they should be doing, you know, in that Train-the-Trainer kind of model or other things they have learned in their training, it’s important to teach employees how to share relevant content.

So, what is relevant content? Relevant content is, you know, at the very basic level guidelines, you know, do’s and don’ts, company policy on social media. You know, this is sort of bare bones. Everyone, even if they’re not engaging at all, needs to have some sort of guidelines about what is acceptable and what isn’t. Global editorial calendars, so these are things that... for example, Brunswick puts together a really fantastic, I think it’s quarterly publication called The Brunswick Review which is built with thought leadership pieces from people in the industry, in the communications industry, and from partners, and other people at Brunswick as well. And it doesn’t just get shared through The Brunswick Review mailing list or mailed as a hard copy and show up on a few people’s desks. The reason why it has been gaining traction and turned to something really great is because employees are sharing that relevant content through their own networks. They are sharing... You know, this is something that’s coming out quarterly. People are sharing it through LinkedIn. People are sending it through their particular... to individuals that they have relationships with and saying, “Oh, there’s this really interesting piece. It talks about, you know, something that we touched on last month at our meeting. You might find this interesting.” And that’s something that Brunswick as a company has generated and is really interesting.

You know, something else that companies have put into play that may or may not be right for your company are leadership boards, you know, who is sharing the stuff the most? All of it’s trackable, so who are sharing these kinds of things? And talking to employees and helping them understand what are the correct distribution channels. And that will differ by country and it will differ by demographic. It can differ by lots of different things but I’ve seen... I mean the obvious example is sharing company editorial content through LinkedIn. That’s bit of a no brainer. It’s been sort of handed down and sanctioned as, you know, this is something that’s good to share with clients. But, you know, there are other distribution tools as well.

Unilever has some amazing, amazing commercials for Dove and other products that, you know, whether it’s employees or other people are just interested consumers share massively through Facebook, through YouTube, through their friends. And the key bit I think in this slide is, you know, how to share relevant content.

So, what do you think is relevant? You know, is it a marketing commercial that you actually want to be seen by as many people as possible? Is it, you know, a bit of professional thought leadership that is actually really good to sending to a client or a prospective client who you might like to win over, or a potential partner or someone you’re talking to about some other business related thing. So, I think, you know, it’s the relevant content through the relevant distribution tools in terms of what you’re talking about and what you’re trying to achieve.
And in terms of achieving all of those things, it reminds me of a quote, “Our greatest strength lies in collaboration, not competition.” So, everyone is a part of it. How can everyone be a part of it? And it’s about educating and empowering and enabling everyone to be a part of helping you achieve your vision. What are some ways that you can... What are some strategies that you can put in place to motivate your employees and your employees working on digital teams? We’ll come to an example about this in a minute, but some strategies are gamification, incentivization, and scoreboards and leaderboards. Everyone is familiar with incentivization at work, whether it’s in terms of doing well, achieving your objectives, achieving your goals, and getting a promotion, getting a bonus, or getting a raise. Those are things we’re all used to working with in a corporate context.

Scoreboards and leaderboards and gamification are a bit newer but it’s things that are... they are strategies that are unlocked when you bring digital into the mix.

**Building Support For Your Strategy**

There’s some critical things that you have to do and some critical questions that you need to have, that you need to ask in order to secure internal support for your programs, from either your fellow marketers or from other people within the company who you would like to adopt the program that you’re putting forward. Some of those things are how digital transformation will help them achieve their own goals. And it’s asking that question and helping them, making sure that you understand what their goals are to be able to answer them in the best way.

So knowing your audience when you’re answering that question or helping them answer the question. How digital transformation will benefit the entire team? So, then their entire team and then more broadly in the context of a company. And then if they are on board or open to the idea of getting on board with your program, how can they easily get started? So that’s part of your job as the digital leader to have the concrete steps of letting them know what to do when they say, “Okay, we’d like to do it. What now? Now, what should we do?”

And part of that is also the types of support they’ll receive from your team. Not just saying, “Well, you know, we’d like to do it. Here is what you should do.” But again, having that two-way street of it’s putting new processes in place and they’re going to need that centralized structure of somebody to come back to. What will you give them? How will you support them? Who do they come to if they have questions or issues or if it is working out or if it’s not working out? And, finally, how their success will be measured globally? I wanted to take one minute to talk about the effects of employee advocacy on digital transformation.

So, that’s really embodied in this Venn diagram, where employee advocacy is in the middle and overlapping all of these things where it encompasses recommending products and services in a genuine and authentic, not overly salesy way, where employees are embodying the company’s best interest and also generating brand exposure.

Let’s take a closer look at some of the elements of digital transformation and how you would embed that digital transformation into the fabric of your company. So, I worked with clients when I was at Brunswick on how exactly they would do this. And sometimes we were playing the role of one of the five points in this circle.

So, educating and partnering with key stakeholders. That’s something where at that point we were working with the company to say, well, first of all, to identify those key stakeholders. Who were going to be the key stakeholders in your company who need to get on board and how should you educate them? What should you be telling them? How can you partner with them? And really what that
comes down to is what's in it for them; in a very positive business kind of way of why should they dedicate time and resource to this program? And that’s really the content of what you’re trying to educate them with.

And then company-wide communication of results. Once you have those key stakeholders on board at a certain point when you’re trying to get that widespread option, everyone becomes... everyone who needs to play a role in adopting this is... becomes a stakeholder of yours.

So how exactly will you do that and how will you communicate those results? And letting them know that this is something that is worthwhile. And, again, that can be things like, you know, a company newsletter. It can be just talking to people ahead of team meetings. It depends... in order to have it be an agenda item, it depends how does that internal communications work within your particular company and how can you work with that internal comms to communicate the results of what you’re doing, to get it really embedded in the fabric of the company. So that people feel like it is part of what they are doing and not something that’s been imposed upon them.

So, ensuring the digital strategy is considered to be critical is really related to that as well. And that if it’s communicated to everyone and they understand they’ve been educated on how it’s going to have an impact on their business, on what they do, then they’ll be a lot more likely to accept it and to have it be embedded, you know, throughout the broader fabric of the company. Securing a variety of digital supporters.

When I look at a problem and when I work with companies, there’s usually three kinds of people in varying percentages. The people who, you know, kind of going back to Moore’s Curve, you know, you have the early adopters and innovators, the people who are going to get it and who are going to immediately be your digital supporter. That’s one part of that variety. You know, the group in the middle, where you can probably win them over if you have a compelling case. And if you don’t have a compelling case, maybe they shouldn’t be won over.

And the third group that is going to be extremely difficult or impossible to win over in one way or another. So, as long as you have in your strategy that you’re planning to secure a variety of digital supporters, and not only focus on those people that are going to accept it easily, then you’re going to be more likely to be successful. So just keeping that into account, keeping into account that you might have to reach different groups of people in different ways, it can really help you in getting that more widespread adoption, having it being more embedded in the company.

And the final point, creating a company-wide employee advocacy program. So, the first people that might be involved in that might be... the first people who might be drawn to that might be those innovators and early adopters. But I wouldn’t underestimate the people who needs to be won over and some of the really difficult people to be won over. Because often, in my experience, it can be people who have been with the company for a long time or not, who are really committed to the company and are wary of things coming in, of fads if they don’t really see the value or something that’s likely to come in, be a lot of work and not be there tomorrow.

But if you can win them over through some of those approaches that we’ve been talking about through data, through basically evidence-based decision making, then they can often end up being your strongest supporters.
LESSON 4: EVALUATING AND REPORTING ON A DIGITAL STRATEGY
Let’s talk a bit about monitoring and measuring digital strategies. The first step in this process is mapping your marketing plan. What exactly is it that you are going to do? And then once you have that map, you can add metrics to that map that help fill you in along the way about how you’re doing on your plan journey. Then you can create composite metrics about things and you can determine the business impacts of what it is that you are doing. At the end of that, data allows you to review and repeat what it is that you are doing. So do you need to refine your map? Do you need to add other metrics to the map? Are there some that are not helpful for you that you can add or take off?

We talked earlier on that you want to set a goal and then choose some KPIs, some Key Performance Indicators, to let you know how you’re doing with that goal, how are you doing in achieving it. Here are some suggested KPIs that you might want to build into your program. I have a couple stories for one or two of them that I’ll get to you after we talk through them to see what they are.

So the growth of digital and social communities is one, brand engagement, sentiment analysis, and effectiveness of paid media campaigns are some more, average revenue per channel, Net Promoter Score, website visits, increase in qualified leads from social, and marketing costs per advocate. So I want to tell a little story that some of you might have seen a bit across social media and it’s about the potential impact of sentiment analysis on an advertising campaign, on a direct to consumer marketing push.

So about a year ago, Jennifer Aniston did a commercial for Emirates, where she is on an Emirates plane and has... she is on an Emirates plane and she ends up having a nightmare that she is on another plane, that doesn’t have quite such good facilities in business class. So she is going to ask the flight attendants, “Where is the shower on the plane?” And everyone is sort of laughing and it turns into this nightmare for her that there are not showers on this plane. But, luckily, she wakes up, and is on actually the Emirates plane and they do have a shower. So the intended effect of this commercial was to showcase the Emirates A380 and it has all of these wonderful facilities. So this got some good reviews online and some good sentiment and it also attracted some really negative sentiment online as well.

So because of... the first bit on the slide because of the growth of digital and social communities, there was actually a lot of negative backlash against this ad of saying, “Well, you know, it must be nice to be able to wake up from the nightmare of flying economy and going back to flying business class, where we have a shower. Isn’t that nice?” But actually considering the audience that most of us flying economy... considering how that message landed with a lot of people, there was actually quite a lot of negative sentiment on the internet, and through social digital communities about that ad. So that was a year ago but Emirates didn’t say, “Right. It didn’t work so well. We didn’t like the way some people reacted to that. We are not going to do that again.” They actually put out another add about a week ago. So we’re... so about a week ago, they put out another ad where again it’s Jennifer Aniston and again she is in business class in her lovely A380 pod and comes... flew to her seat... comes back to her seat, where she’s been like the lovely amazing palatial bathroom on this plane, comes back to her seat and there’s a little boy in her seat in business class, flying a plane. And long story short, she asks him where he is on his way to, and she ends up bringing him back to his mom and dad and sibling who are back in economy. So she brings him back and the family, obviously mom and dad, instantly recognize her actually as Jennifer Aniston. They are totally floored that this massive celebrity has brought back their son to the seat. And what ends up happening in the end, is that Jennifer Aniston is actually super psyched to hangout in economy. She would actually
rather be there because there’s loads of stuff to do. There’s loads of games. The seats are comfortable. And she ends up giving the mom from the family her seat in business class.

So it’s not the focus of the commercial. What actually is the focus of this consumer marketing piece, that’s gained traction on YouTube and have been shared by people on YouTube, is that it shifted the focus from how great is business class to actually how great is economy. You know, someone like Jennifer Aniston who has access to this business class seat would love to be in economy as well.

So I think that is a wonderful example of how a company has learned... whose kind of made a mistake through the eyes of some people, and had quite a negative backlash and some negative sentiments attached to this original commercial and has I guess recovered from that and leveraged that to something that’s gotten a quite positive reaction from what I’ve seen so far. And it’s attracted, I think, 2.3 million views when I checked yesterday, in the first weeks that it’s been out. So it’s reached several million people. I’m sure it will reach more. And it’s actually had the effect where it’s been... where that ad is now being covered in the mainstream news, in traditional media for something that started out as quite digital.

So I think that teaches a few lessons and especially the lesson of why we need to measure, why you need to iterate, and why you need to keep the things that do work and tweak the things that haven’t worked, in order to get it right for you and your business.

The next concept that I wanted to cover in metrics is vanity metrics versus quality metrics, and how do we understand the difference. So vanity metrics can be a bit more superficial and only touch on the surface of some quantitative elements of how things are gaining traction. So some examples of those would be things like the number of likes or web traffic or who’s watching things, perhaps. And they don’t really provide actionable output. They don’t give you information on, “Is this achieving what we wanted to achieve? Or how can we change that?”

If you look at quality metrics, quality metrics highlight the business impact a little bit more, so conversation rates, using metrics that are more appropriate to your business, and to the channels, and actually do provide actionable outputs, to be able to informed decision making. So if you go back to that example we were just talking about, about Emirates and their A380, presumably, by talking about how wonderful the plane is, they want to sell more tickets. They want people to fly on their airline and to publicize their airline. So a vanity metric on the surface might be how many times the video of last year’s commercial was shared. So on the surface that might even look great. Maybe that was shared 23 million times or you know lots of times. They might say, “We’re getting lots of traction with this.”

But if you think about how is that going to translate into us selling more tickets on our airplane, to the people who are buying the majority of tickets, if you dig a bit deeper into those conversations, into those views, actually what you’ll find online is a lot of negative sentiment for how that first ad was targeted. So in looking at what was the actual sentiment behind those, what were some other metrics, what do those metrics mean, you can access more actionable information to informed decision making.

In this case, it looked like... I didn’t work on it personally, but it looked like they maybe took a look at that sentiment and say, “Well, that didn’t quite land the way we wanted it to. So maybe what we should do is actually target... maybe we should try to get across a message that, you know, it’s great to be in economy as well on our planes. And actually the kind of people who fly business class would even love to be in economy on ours.” And that might be something that they have looked at by
figuring out those... using quality metrics and about the characteristics of what do those more superficial numbers mean.

And that’s something that you want to think about when you’re saying, “What are my goals? What are my KPIs? Is it just the number of likes? Is it the number of views on a particular commercial, while loads of people watch that? That’s a success? Or is it that loads of people watched it. Loads of people were sharing it and saying, Oh my God, can you believe this?” So, which is what happened at least in some communities, in some digital communities online. So keeping in mind that difference can help you as you are outlining your KPIs and as you’re revisiting them along the way as well.

Another thing to take into account is benchmarking to improve effectiveness. We’ve talked about this a few times along the way of benchmarking things that have worked well in your company, things that are already in place but also benchmarking other companies in your sector, and other companies across sectors. So how exactly do you do that?

A key bit of benchmarking has to do with gathering data, analyzing that data and then taking action. So how can you understand what people are doing? What kind of results are they getting from that? And then how can you build that into your plan and adjust your strategy according to those insights?

**Reporting to Stakeholders**

Then once you have information about how things are going for you, you have information about your own KPIs, about your own metrics, and not just what the numbers are but what they mean, and what you’re going to do differently because of those numbers, is it more of the same, is it something different, once you have that information, then you’re really well positioned to be able to report back to executives.

So, how do you craft impactful reports? Getting the right distribution list is important to begin with and making sure that you have key KPIs for each management team, including what they care about, because each management team might care about different things.

The frequency of reports is something really to keep into account. Do people report on things quarterly? Are people reporting... I would think every year is probably too little. How much is too much? How much is too little? And again, that’s going to depend on how big your company is. How much interaction that you have with those executives that you are reporting to? And, in general, what is the culture? Do people like to be involved in the things directly in your team? Do they only want to hear when something is a success and they want you to sort out problems on your own? Do they want to be involved along the whole journey? That’s going to be determined by your culture but it’s definitely something to think about when you’re building in how you’re going to structure that communication with your executives. What is the best reporting format?

Often, again it depends on the culture but often, best reporting format will be something that they are used to, and something that reinforces the value to the company. So what are those key venues to present your results? Should you use the same reporting format? Should you use the same venues? Should it be something different? Should it be something a bit more casual or will that be likely to be brushed off? Should you have a formal spot at board meetings or at other quarterly or a more frequent meetings that you have? Are all things that you need to think about in order to best position how those or how that reporting to executives is going to be received?

And make sure as well that you can try to have a continual feedback loop, that it’s not just you sending reports that people may or may not read, but making sure that you hear, well, what did you
think about that? You know, are you keying for us, you know, to keep going forward? And managing that tone and how that lands with the people. That will be your advocates or it can be your road blocks.

Executive Digital Footprint

So here are four concepts that executive leadership should be hearing from you about the benefits of social channels. And they may or may not have heard these at other parts along the way where you’ve involved them with your strategy, where you’ve tried to get at least one advocate on your side early on in the game. But things that will be important for you as you’re reporting back maybe to a broader audience than you were in the early days.

So going through these in turn, that the company is seen as progressive. Consumers and other people get their information in different ways. If you’re not in digital, you’re not listening to them and they’re not hearing you. So, being seen not only as progressive but just keeping up with the way things are going and not being left behind. One or the other of those messages usually has a successful way of landing with the people that you’re trying to reach.

Number two, building awareness of the company and the vision. People, especially in the comms team, are always thinking about raising awareness about the company. They’re always thinking about the company and its vision. If they’re not already on board or if you’re not already part of the comms team, they are a great place to start, especially if they’re linked in really closely with the executive leadership.

Number three, creating thought leadership. Creating thought leadership can often have positive or a negative effect, reaction I suppose, from the executive leadership. And the situations where I’ve seen it have a negative reaction is where they seemed to think it will take a lot of time or a lot of time that they don’t have. And I think in some of your work in finding those case studies and in finding that evidence-based, you can show and demonstrate how that’s not necessarily true.

And that thought leadership can be something that everyone is empowered to do through what they’re sharing, through what they’re talking about, and how they’re engaging with things. And it doesn’t necessarily need to be a CEO blog, you know, in some sort of very traditional sense. So I think helping them understand the benefits of social channels and what thought leadership might mean, I think that you can help them realize that they might already be doing some of that or that there might be some small changes they can make, or that other people can make within the organization to leverage that stuff, to benefit the company.

And the final point is generating incremental value opportunities. So, I think a lot of things... really what brings home... this is what brings it home for me is that the reason why we’re doing this is to help the business. It’s not a nice to have. It’s not something that we would just like to do to spend money or to, you know, churn resource. It’s something that’s going to generate value for the business in one way or another. Some might be direct. Some might be...there might be a direct correlation between, you know, the number of people watching that Emirates ad and the number of people buying tickets on Emirates planes. I don’t know if they’ll be able to see that but they might be. There certainly have been instances in the past where a social media campaign, either positive or negative, has had a direct impact on the share price of a company as well. And there might be some other benefits of social channels that have longer term impacts on the value opportunities.

I think one really clear example of that is a company that’s recently been acquired for $1 billion called the Dollar Shave Club, that started really with a video on a social channel. You know, a very clever,
very funny YouTube video launched this company in 2012. And in 2016, they were acquired by Unilever for $1 billion. And one of the quotes that I recently read on Forbes, from an analyst who was looking at this deal said, you know, “The things that drive multiples or things that drive valuation are the financial metrics and the story.” And I don’t think that speaks anything clear than $1 billion acquisition of a company that built a brand in four years selling razors, which is a pretty boring product I think at the end of the day. But they had a certain story that they leveraged through social channels that really landed with people, that really had growth and that had, you know, in its own way was really thought leadership. And it certainly built awareness of the company. It built a vision.

And then as a result, you know, people shared that, employees shared that. People thought it was hilarious and they shared it. And, you know, that created, I mean quite literally a $1 billion value for a company in four years. So I mean, I guess that’s bit of a unicorn if we’re talking about it.

But if you want to think about the ability for channels to generate value and to build that awareness, to help you build your corporate narrative and to underscore that corporate story, I think that’s a really important example to be able to show it to your executive leadership. And there must be others in your sector as well if you take a review in your team, take a bit of time to find them.

One of the final things we’re going to talk about is the executive digital footprint. What are three steps to establishing an executive digital footprint and what does that mean? The three steps we’re outlining are take part and take control, demonstrate leadership, and gain distinctive industry insights. Take part and take control means don’t avoid the channels. And take control really means you need to be there and you need to set up a presence. They need to set up a presence. Because if you don’t, somebody else might. I brought up the example before. I have a contact who works at a major corporate company and she didn’t have a LinkedIn profile. So somebody actually found a photo of her, set up a LinkedIn profile, and went and connected to a whole bunch of her colleagues. And then as a result of that was able to see who their contacts were as well. And I don’t know what they did with that information but I think that is a real cautionary tale. And she’s not the only person this is...you know, this has happened to. People have set up fake Twitter accounts for companies that I’ve seen in financial services posing to be them. They can have price sensitive impacts on a company. So take part, take control at the very least. When you set something up, lock it down so that somebody else can’t be there. And, you know, have some sort of system for checking on things every once in a while.

Demonstrating leadership is really going one step beyond that. It’s not just about have a placeholder, so somebody else can’t get in there. But it’s...you know, it’s about having best practice. We talked earlier about how you as a digital leader should lead by example, have a complete profile, talk about things, share important things online, depending on the channels where your potential partners, customers, clients, employees are. Because when you’re sharing things, you are also part of the conversation and you are listening which brings us to point three. So gaining distinctive industry insights. Surely, you have some way and your executives have some way of getting the industry insights. But if there was a way to gain more of them, it would be viewed to be a part of that conversation. And the considerations of not spending too much time and being a part of that conversation without having to trial through loads of things can be up to you in your digital training of, you know, are there lists of key stakeholders that people may want to follow, so they don’t need to develop that list on their own?

So these are things that you can support people in doing. But these are the three steps really to establishing that digital footprint that executives are going to need to move forward. So delving one
level deeper into that same concept of the executive digital footprint, you can create... we’ve already talked about creating an effective executive profile and part of that security is also controlling your privacy and confidentiality.

Each channel will have different settings and that’s part of your role as the digital leader to either outline in the training for employees what those are and how they should be aware of those and how they should be set if necessary. Or appointing someone in your team to help take control of that as well. For example, most people know about on LinkedIn there is a setting that if you... and I think the default is that anyone can see that you have viewed their profile. So if I view your profile, they can look into basically their history and say, Christine Pullman has viewed their profile. So they will know that I have looked at it. But there is a privacy setting that you can then become anonymous. So it will be an anonymous LinkedIn person has viewed that. And you give up sort of some rights to some data if you change that setting because you can’t see who’s viewed you anymore. But that’s just an example of one of the privacy and confidentiality settings to take into account and to inform your team members about as they are...and your executives about as they are setting out with their digital footprint. And the issue that we talked about on the last slide as well is the ability to efficiently connect with the people that matter.

So, one way that you can really save executives time is by helping them understand who are the people that matter. So you can have more junior members of your team or you can take part in mapping those stakeholders, who are important to your company and important to your industry or who are visionaries and thought leaders in other industries that you can learn from as well.

So, these are ways that you can save people time. It’s all part of the approach of anticipating questions and resistances that people will have, and trying to have some suggestions or answers for them, to help address those concerns. And over time, as your presence online grows, you can really start to meaningfully demonstrate leadership. You can show that your company is innovative through socially engaged leaders. You don’t need to tell people that because they won’t believe you. But if you show and demonstrate what your people are doing, they will say, “Yeah, that is a company where their people get it. Their people are engaged in this, not that they say they’re innovative.”

Everyone says they’re innovative but are you showing that? Are you really demonstrating that? And part of how you do that...part of how you demonstrate that is by offering an authentic human face to your company. People don’t want to see the logo talking. People want to see people talking. And, you know, they will... they can understand who you are. And that’s part of those concepts of the thought leadership landing well and not that it’s someone selling and someone towing the company line that they’ve been told to say it’s about someone really believing in the company and believing in what it is that you’re trying to get across. And offering that authentic voice because you believe in the things that your company is doing and you want to share them. You’re almost being...you’re being a teacher. You’re playing a part in education rather than trying to sell a product.

And beyond your company, that also comes to... that also underscore being a voice for your industry, commenting on things that are going on in your industry. And maybe you want to have for yourself and your team some guidelines on that or some examples, some examples of what good looks like, what good doesn’t look like, what bad looks like even, being the voice for your industry. But demonstrating that you’re a part of the conversation. You’re demonstrating that leadership online in the digital space. And then it actually ends up coming back to you, a payback in terms of being the first... the press to reach out to you in case of a brand crisis.

At Brunswick, we did a lot of planning for crisis preparedness, you know, crisis management, you know, what do we do if this happens. And taking the time to build a digital footprint and demonstrate
leadership and be there means that media will come to you. Media will be more likely to come to you for a response to something. And then you'll be able to respond in a more front foot way because they've come to you early on rather than being blind sighted by things or having them go to somebody else, or having, you know, having the message dispersed.

So there is... I mean that’s just one example of payback for adopting this type of leadership. In addition to the talking that you can do and the outward messages you can display, you can gain distinctive industry insights by being online. You can, by having an executive digital footprint, staying on top of the leading ideas in your industry, hiring the best talent available worldwide, finding, you know, who are the people who are engaged in the industry, who are engaged to you and your company and try acting to retain them, or people who you might like to join as well, and keeping tabs on other competition and other potential acquisitions.

So just learning where the conversation are happening and either, you know, as individuals or in a more concerted strategic company way of making sure that you have... you’re gaining everything that you can from this conversations that are happening with or without you listening.