

Digital Transformation Canvas

The Digital Transformation Canvas is designed to support you in recognizing the key elements that make your technology transformation vision a reality.

Published By :
Gorilla IT Academy

Gorilla IT
All systems go

Preface

Stepping into the world of digital transformation can feel like a leap into the unknown for many of us. It's a bit like learning to swim; there are moments of flailing, but also moments of triumph as you learn to navigate new waters. This book is here to be your life jacket, designed to make the process of digital change as straightforward and understandable as possible.

We know that diving into digital can sometimes feel overwhelming, with all its technical jargon and rapid developments. That's why we've focused on simplifying things, breaking down our approach to software development into clear, easy-to-follow steps.

Whether you're just starting to dip your toes into digital technology or you've been swimming in the digital pool for a while and are looking to improve your stroke, this book is for you. We're here to support and guide you, making sure you have the tools and knowledge needed to take full advantage of what digital transformation has to offer.

We've kept things practical and to the point, understanding that you're likely balancing a lot of other responsibilities. This isn't just another technical manual filled with buzzwords and concepts that don't apply to your everyday life. Instead, it's a straightforward guide that speaks your language, designed to help you make the most of digital opportunities in a way that makes sense for you and your context.

By the end of the Digital Transformation Canvas, you should feel more confident about your digital journey. You'll have a solid understanding of the basics, know how to avoid common pitfalls, and be ready to leverage digital technology to benefit your work, your hobbies, or whatever it is that drives you. Welcome to your digital transformation—let's make it a good one.



Contents

Introduction

Welcome to the Digital Transformation Canvas, your starting point for digital change! This canvas is designed to guide you and your team through the initial stages of the software development process. It helps you identify the key components needed to make your vision of technological transformation a reality.

How it works

The canvas is divided into several sections, each focusing on a core aspect of your project. Let's go through each section:

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Start by identifying who your customers are. Who will benefit from your solution? Think broadly and inclusively; Different users have different needs.

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This is your creative space. Any ideas that come to mind, you can write down here. No filter, just brainstorming!



Get Started

Start with a brainstorming session with your team. Fill in the canvas with ideas and thoughts. It doesn't have to be perfect right away; This canvas is a living document that will grow with your project.

Tips

- Be as specific as possible, but stay open to change.
- Involve different team members for a broad perspective.
- Look at the canvas as a whole; The sections are interconnected.

Next Steps

After completing the canvas, use it as the basis for the High-level analysis. This is a model-based method. It will help you define your scope, estimate project size, set goals, and plan your resources.

Download a printable version [here](#).



Digital Transformation Canvas

Designed For:

Designed by:

Date:

Version:

<p>Customer Types </p> <p>Identify the different segments of customers who use or benefit from the solution.</p>	<p>Customer needs </p> <p>For each Customer type, consider their needs, and behaviors.</p>	<p>Customer preferences </p> <p>For each Customer type, consider their preferences.</p>	<p>Customer interactions </p> <p>Map out how customers interact with your services/products, including channels (web, mobile, in-person) and touchpoints (sales, support, updates).</p>	<p>Product Vision </p> <p>Vision states the intention or motivation behind the product.</p>
<p>Services & Products </p> <p>Outline the range of services or products your software offers to each customer type.</p>	<p>Processes & Activities & Roles </p> <p>Outline the processes in scope that the system should support. Break down the processes into specific activities, highlighting the tasks that need to be accomplished. Add roles performing those tasks.</p>	<p>Legacy systems </p> <p>List down the key legacy systems your software interacts with or needs to integrate.</p>	<p>Main data concepts/entities </p> <p>Identify the main data entities that your solution manages, such as customer profiles, transactions, or product information.</p>	<p>Value propositions </p> <p>How is the product/service going to benefit the company? Eg: Increase revenue, give strategic advantage, enter new market, develop the brand</p>
				<p>Key Stakeholders </p> <p>Identify the people in your organization who are important to involve in this digital transformation project.</p>
				<p>Brain dumps </p> <p>Add anything that comes to mind.</p>

How do you use the Digital Transformation Canvas?

The Digital Transformation Canvas is specifically designed to simplify the process of high-level analysis within your digital transformation initiatives.

It provides a structured way to both assess your current digital environment and develop new or improved digital strategies. Moreover, it is an effective tool for regularly monitoring changes inside and outside your organization.

Here's a step-by-step guide on how to use it:

- 1. Gather a diverse team:** Have a group of people with diverse expertise that is relevant to your digital strategy. A team with diverse perspectives fosters deeper insights and more innovative solutions.
- 2. Prepare the canvas:** Print or draw the Digital Transformation Canvas on a large sheet of paper, preferably larger than DIN A3/Tabloid size, so that there is enough space for notes. You can also use the canvas in digital form with tools like Mural.com or Miro.com, which facilitates remote collaboration. A PDF version is available for download.
- 3. Map out the current situation:** Use the canvas to capture your organization's current digital strategy along the twelve elements. Document both strengths and areas for improvement, and make sure you capture as much information as possible.
- 4. Generate new ideas:** Encourage the team to share both existing and new ideas. Use a different color for these ideas to differentiate them from the current situation.
- 5. Develop the three best ideas further:** Select the most promising ideas and develop them further on a new Digital Transformation Canvas. Strive for a coherent whole that supports the chosen ideas.
- 6. Test your ideas in practice:** Validate your ideas by testing them with customers, suppliers, employees and other stakeholders.
- 7. Evaluate and iterate:** Come back with feedback, evaluate the findings, and repeat the process until your digital strategy is refined and ready for implementation.



Customer Types



Goal: To identify the different segments of customers who will use or benefit from your solution.

Why it's important: Every product or service has a target audience; people who are most likely to be interested in what you have to offer. By clearly defining your customer types, you can tailor the features and experiences to specific needs, expectations, and behaviors.

How to complete this section

Think broadly: Consider all possible users of your product, both direct end-users and those who may be indirectly affected by it.

Segment: Group customers based on common characteristics – this can include demographics such as age and gender, as well as behavioral traits, such as buying habits or usage preferences.

Be inclusive: Don't forget about less obvious user groups that can also find value in your solution. Think about accessibility and diversity.

Analyze: Look at existing data, such as market research or customer feedback, to help you understand who your customers are and what makes them unique.

Visualize: Make use of personas – detailed descriptions of fictional characters that represent the different user types. This helps to bring your customer types to life and makes them more relatable to your team.

Examples

- A finance app may have client types such as: “young professionals who want to manage their finances,” “experienced investors looking for advanced tools,” or “retirees who want to monitor their savings.”
- An e-commerce platform could segment into ‘repeat customers’, ‘bargain hunters’, and ‘one-time buyers’.

◆ Tips for success

- Stay open to new insights and be prepared to revise your understanding of your customer types as you learn more.
- Involve different team members in this discussion to get the most complete picture possible.

Use these insights as the foundation for the rest of the canvas's sections. By having a clear picture of your customer types, you can make better decisions about product development, marketing, sales, and customer service.



Customer Needs



Purpose: To identify the specific needs, wants, and expectations of each customer type you've identified.

Why it matters: Understanding what your customers need is crucial to the success of your solution. Customer needs are the drivers behind the decisions they make; If your product or service doesn't address these needs, customers will look elsewhere.

How to complete this section

Research: Conduct customer conversations, conduct surveys, and analyze customer data to gain an in-depth understanding of what your customers really need.

Listen to feedback: Look at customer service logs, online reviews, and other feedback channels to uncover common themes and issues.

Identify pain points: What are the challenges or problems customers experience with current solutions? How can your product address them?

Prioritize: Not all needs are created equal. Determine which needs are most critical for your customers and which are 'nice-to-haves'.

Document thoroughly: For each customer type, write down the core needs and how your solution will fulfill them.

Examples

- For a “young professional” client type, there may be a need for “intuitive budgeting tools that are quick and easy to use.”
- An “experienced investor” may need “advanced analytical tools for risk management.”

◆ Tips for success

- Be specific and avoid general statements. The more detailed you can describe the needs, the better you'll be able to address them.
- Check your assumptions. Make sure your insights are based on real data and interactions, not what you think customers want.
- Expect change and be flexible. Customer needs can change as the market or technology changes, so stay alert and responsive.

By meticulously completing this section, you'll create a strong foundation for your product design and develop an offering that resonates with the people you want to reach.



Customer Preferences



Purpose: To find out the unique preferences and expectations of each customer type with regard to your product or service.

Why it's important: In addition to understanding basic needs, it's essential to know your customers' specific preferences. These preferences can range from the way they interact with your product to specific features they find valuable. Tailoring your offerings to these preferences can significantly increase customer satisfaction and engagement. In addition to understanding basic needs, it's essential to know your customers' specific preferences. These preferences can range from the way they interact with your product to specific features they find valuable. Tailoring your offerings to these preferences can significantly increase customer satisfaction and engagement.

How to complete this section

Determine unique traits: Identify what makes each customer type special in their interaction with products/services like yours.

Analyze behavioral patterns: Look at usage analytics and customer journeys to understand how customers want to use your product.

Be mindful of trends: Pay attention to market trends and feedback to see what preferences emerge or change over time.

Ask directly: Nothing beats direct communication with customers. Ask them about their preferences through surveys, interviews, or user testing.

Prioritize preferences: Just like needs, some preferences are more important than others. Identify which preferences are most influential for customer decision-making.

Examples

- “Young professionals” may prefer mobile accessibility and social integration, while “experienced investors” may prefer desktop applications with extensive reporting features.
- A ‘repeat customer’ on an e-commerce platform may value personalized recommendations, while a ‘bargain hunter’ may be looking for price comparison features.

💎 Tips for success

- Notice the subtle differences between ‘need’ and ‘want’. Preferences are often the ‘wild cards’ that can elevate a product from good to great.
- Create a feedback loop. Establish mechanisms to continuously collect and assess customer preferences.
- Be prepared to adapt. Customer preferences can change, so your approach needs to be dynamic enough to change with them.

By gaining a clear understanding of customer preferences, you can fine-tune your product strategy to not only meet but exceed your customers' expectations.



Customer Interactions



Goal: To map out how and where customers come into contact with your product or service, and what interactions they have with your organization.

Why it's important: Customer interactions are all the moments when the customer comes into contact with your brand, product, or service. These can be direct interactions, such as using an app, or indirect ones, such as reading a review. Having a good understanding of these touchpoints is essential to creating a customer journey that is seamless, enjoyable, and valuable.

How to complete this section

Identify touchpoints: Map out all possible touchpoints, from initial awareness to purchase and aftercare.

Assess the experience: Understand how customers experience these interactions and what emotions and thoughts they evoke.

Look for improvements: Identify opportunities to improve customer interactions – this could mean simplifying processes, improving the user interface, or providing better customer service.

Follow the journey: Consider the entire customer journey, and how each interaction impacts the next.

Use data: Collect and analyze customer behavior data to deepen your understanding of these interactions.

Examples

- In a SaaS product, touchpoints can include website visits, sign-ups, onboarding, day-to-day use, support, and upgrades.
- For a retailer, interactions can take place through the webshop, the physical store, customer service, and social media.

◆ Tips for success

- Be thorough and thoughtful. Every interaction is an opportunity to deliver value.
- Look from the outside in. Adopt the customer's perspective rather than an organizational point of view.
- Innovation is key. Don't be afraid to be creative in improving customer interactions.

By having a clear overview of customer interactions, you can ensure that every step in the customer journey is positive and contributes to a stronger relationship between the customer and your brand.



Services & Products



Purpose: To clearly define the offerings of your software, the services or products you provide to each type of customer.

Why it's important: This section helps concretize what you'll actually deliver to your customers. By detailing your services and products, you can ensure that they are well-aligned with the needs and preferences of your customer segments and that they contribute to your overall product vision and value propositions.

How to complete this section

List your offerings: Write down what services and products you offer, and be as specific as possible about what they entail.

Match with customer segments: Link each product or service to the customer types you've identified. How does each offering meet their specific needs or preferences?

Name the features: For each product or service, describe the key features and benefits. What makes them unique or valuable?

Visualize the offer: Consider the entire customer journey, and how each interaction impacts the next.

Use data: Collect and analyze customer behavior data to deepen your understanding of these interactions.

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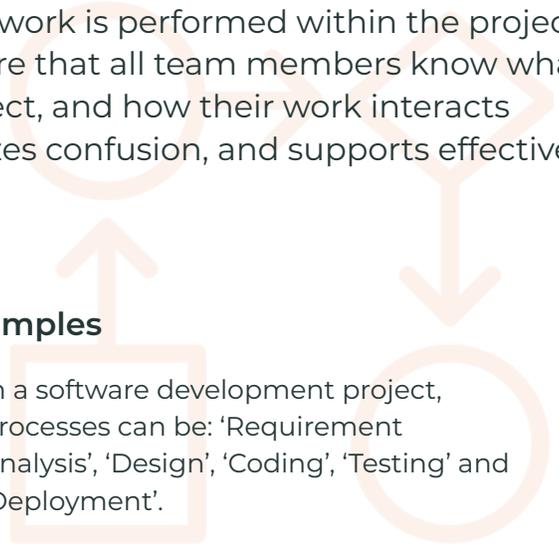


Processes, Activities & Roles



Goal: Define the operational aspects of your project by specifying the core processes, the associated activities, and the roles of team members.

Why it's important: This section helps organize how work is performed within the project. By clarifying processes, activities, and roles, you ensure that all team members know what is expected of them, how they contribute to the project, and how their work interacts with that of others. This promotes efficiency, minimizes confusion, and supports effective collaboration.



How to complete this section

Break down the project: Identify the key processes required to deliver your product or service. This can include development

Define activities: For each process, describe the specific activities that need to be performed. Be as detailed as possible.

Assign roles: Determine who is responsible for each process and its activities. Identify existing roles within your team or define new roles needed for the project.

Visualize the workflow: Use diagrams or flowcharts to illustrate how processes and activities are connected and how work moves through the project.

Stay flexible: Be open to adapting processes, activities, and roles as the project evolves or your team grows.

Examples

- In a software development project, processes can be: 'Requirement Analysis', 'Design', 'Coding', 'Testing' and 'Deployment'.
- For a marketing campaign, activities may include: 'Market Research', 'Content Creation', 'Social Media Management', and 'Analysis of Campaign Results'.

◆ Tips for success

- Communicate clearly. Make sure everyone on the team understands what the processes are, what their role entails, and how their work contributes to the bigger picture.
- Encourage collaboration. Provide mechanisms where team members can easily collaborate and share information across process boundaries.
- Evaluate and improve. Be prepared to review your processes and workflows based on feedback and the results you're getting.

By clearly defining processes, activities, and roles, you'll lay a solid foundation for your project execution and ensure that your team can function like a well-oiled machine.



Legacy Systems



Goal: To identify and understand existing legacy systems that need to be integrated or will impact your new software solution.

Why it matters: Legacy systems are often deeply ingrained in an organization's operational processes. They can present limitations and challenges, but they can also contain crucial business logic and data that must be preserved. A thorough understanding of these systems is essential for successfully integrating new solutions without disrupting business continuity.

How to complete this section

Take an inventory: List all existing systems that are relevant to your project. Briefly describe their function, the technology they run on, and the data they contain.

Assess the impact: Evaluate how these legacy systems will interact with the new solution. Consider compatibility issues, dependencies, and potential integration points.

Identify challenges: Write down any specific technical, operational, or organizational challenges that come with integrating these systems.

Plan for integration: Develop a preliminary plan for how you want to integrate, update, or replace these systems. This can include technical solutions, migration strategies, or business process adjustments.

Determine responsibilities: Assign team members responsible for managing interaction with legacy systems, including technical integration, data migration, and user training.

Examples

- A financial institution may have an old banking system that contains essential customer transaction data but is built on outdated technology.
- A retail business may use an inventory management system that is not compatible with modern e-commerce platforms.

◆ Tips for success

- Conduct thorough research. Fully understand the functionality and limitations of each legacy system before making plans for integration.
- Communicate with stakeholders. Involve users and administrators of these systems early in the project to understand their insights and needs.
- Be realistic about risks and limitations. Not all integration challenges can be overcome; Sometimes it's better to consider alternative solutions.

Carefully mapping and planning for dealing with legacy systems ensures that your new software solution fits seamlessly with the existing IT infrastructure and supports a smooth transition for the organization.



Master Data Concepts/Entities



Purpose: Identify and define the core data concepts or entities that are central to your software solution. This includes understanding how this data is generated, stored, processed, and used within the application.

Why it matters: Data is the backbone of any digital solution. A clear understanding of key data concepts and entities is essential for designing effective database structures, ensuring data integrity, and supporting the functionality users need. It also helps identify data dependencies and integration points with external systems or legacy applications.



How to complete this section

List key data concepts: Identify the key data that your application will manage. This can include customer profiles, transaction records, product information, etc.

Define relationships: Describe how these entities relate to each other. For example, customers can have multiple orders, and each order can contain multiple products.

Determine attributes: For each entity, define the attributes or fields that contain information. For example, a customer entity can include name, address, and contact information.

Consider data integrity: Consider rules and restrictions to ensure data accuracy and consistency.

Plan for data storage and access: Decide how and where data will be stored, and how applications and users will access and interact with this data.

Examples

- For a healthcare application, main data concepts might be patient data, appointments, treatments, and medication prescriptions.
- An e-commerce platform can have entities such as users, products, orders, and payments.

◆ Tips for success

- Be as specific as possible when defining entities and attributes. This provides clarity and avoids confusion during development.
- Involve domain experts in identifying and defining data concepts. Their knowledge can be crucial for accurately modeling reality.
- Think future-oriented. Consider how your data structure might evolve as the needs of your users or the market change.

By carefully identifying and defining core data concepts and entities, you lay a solid foundation for your application architecture and ensure that your system can meet the demands of users and business processes.



Product Vision



Goal: Define the overarching intent or motivation behind your product or service.

Why it matters: The product vision is the guiding light for your entire project. It inspires and gives direction to everyone involved, from developers to marketers, and of course the end users. A clear vision ensures that everyone is working towards the same goal and understands why the product is important.

How to complete this section

Think Big: Allow yourself to think big. What do you want to achieve with your product in the long term?

Be inspiring: Formulate a vision that excites and motivates people. It should express an aspiration beyond profit or market share.

Keep it concise: A good product vision is simple and easy to understand. It should be able to be explained in a few sentences.

Make it measurable: While a vision should be big and ambitious, it should also be achievable. Think about how you might measure progress toward this vision.

Involve the team: A vision must be shared by everyone. Make sure the team can provide input and commit to it.

Examples

- For a health app, the vision might be, “A world where everyone is in control of their personal health and well-being.”
- An e-commerce platform might say, “Creating the most customer-centric buying experience on earth.”

◆ Tips for success

- Reflect on your core values. What is really important to your organization?
- Think about your impact. How will your product change the lives of your users?
- Be consistent. A vision is not a sales pitch; It's a promise and a commitment to your customers and your team.

By defining a strong product vision, you give everyone involved in the project a clear and motivating direction forward.



Value Propositions



Goal: Describe how your product or service creates value for the customer. It's about making clear the unique benefits and selling point of your offering.

Why it matters: The value proposition is the promise of value you're going to deliver. It's the primary reason why a customer should choose your product or service over the competition. A strong value proposition makes your offering distinctive and desirable.

How to complete this section

Identify unique benefits: What does your product offer that no other product does? This can be something tangible, like a feature, or something intangible, like customer service.

Understand your customer: Looking back at the 'Customer Needs' and 'Customer Preferences', how does your value proposition align with this?

Communicate clearly: Your value proposition should express in simple language why your solution is the best choice.

Be specific: Vague promises are not convincing. Make sure you can identify concrete benefits.

Show the difference: Make it clear how your product stands out from competitors.

Examples

- A project management tool might have as a value proposition: "Maximum project efficiency with minimum effort, thanks to AI-driven planning."
- A sustainable clothing brand might say, "Not only do you contribute to a better world, but our clothes stay beautiful twice as long."

◆ Tips for success

- Test your value propositions. Verify them with real customers to see if they resonate and convince.
- Be considerate of feedback. Be prepared to adjust your value proposition based on what you learn from customer interactions and market developments.
- Link back to your product vision. Your value propositions should align with the larger vision you have for your product.

By formulating a clear set of value propositions, you not only strengthen your product offering, but also build the foundations of your brand identity and market positioning.



Key Stakeholders



Goal: Identify the key people inside and sometimes outside your organization who play an important role in the digital transformation project.

Why it matters: Key stakeholders influence decision-making, resources, and project direction. Mapping these individuals will help you understand who to inform, who to consult, and who to involve in the planning and execution process.

How to complete this section

Think broadly: Consider all possible stakeholders, including directors, investors, team members, customers, and partners.

Analyze influence and importance: Determine who has the most influence on the project and who is most impacted by the outcomes.

Establish a communication plan: Every stakeholder has unique information needs. Think about how and when you communicate with them.

Plan engagement: Decide how you're going to involve stakeholders in the project. Who has a say in decisions? Who just needs to be informed?

Consider relationships: Understand the dynamics between different stakeholders and how they can affect project progress.

Examples

- In a software development project, key figures can be: the CEO, the CTO, project managers, lead developers, and key users or customers.
- For a nonprofit, this could include the board, major donors, volunteer coordinators, and the community they serve.

◆ Tips for success

- Be proactive. Don't wait for stakeholders to come to you; Engage them early and often.
- Build relationships. Personal relationships can be just as important as formal structures.
- Be transparent. Openness builds trust and can reduce resistance to change.

Understanding the key people provides a clear picture of who you need to manage and how you can maintain effective relationships throughout the transformation process.



Brain Dumps



Goal: Create a space where team members can write down everything that comes to mind regarding the digital transformation project – ideas, questions, concerns, sources of inspiration, and sudden insights.

Why it matters: The ‘Brain dump’ section acts as a creative outlet and collective memory for the project team. It gives space to spontaneity and unstructured thoughts, which are often the seeds for innovative solutions and new directions.

How to complete this section

Write freely: Encourage team members to write without judgment or self-censorship. This section is not for critical review, but for the free flow of ideas.

Diversify input: Invite people from different parts of the project and organization to share their thoughts.

Use stimulating questions: If the ideas don't come right away, use open-ended questions to get the thought process going, such as “What if we...?” or “How can we do this differently?”

Organize regular brainstorming sessions: Schedule sessions where team members can come together and share and discuss their “brain dumps.”

Review and cluster: Periodically go through the content and group ideas that belong together. This can lead to new insights or action points.

Examples

- During a session, a team member might write, “Can we use gamification to increase customer engagement?”
- Another might raise a question such as, “Is there a way to integrate our app with existing social media platforms for better customer service?”

◆ Tips for success

- Be inclusive. Everyone has something to offer, regardless of their role or level of experience.
- Encourage continuous contribution. ‘Brain dumps’ shouldn't be a one-off; they need to grow and evolve with the project.
- Value all input. Even ideas that seem unfeasible can stimulate valuable discussions and creative thought processes.

The ‘Brain dump’ section is an essential part of the creative process. It ensures that no idea is lost and that team members feel heard and valued.



