



# Digital Maturity Assessment: Evaluate Organizational Readiness for Digital Process Automation

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For organizations who were slowly adopting digital processes prior to 2020, there's no doubt the pandemic had a direct effect on the timeline and trajectory for digital transformation. Almost overnight, the need for remote workforces and online access to services experienced a spike like never before. Digital initiatives propelled to the forefront of everyone's mind as organizations from all around the world learned to pivot.

While digitizing content is a necessary starting point, it's digital process automation that secures significant, efficiency-seeking changes. When compared to traditional manual methods of work, digital content and automated processes are far more valuable to businesses in that they reduce operational costs while increasing output, productivity, and security at the same time.

Even if you don't need more convincing that digital process automation is key to radically simplifying the way you work, you might still need help with making this move for yourself. Adopting new technologies, operating digitally, and automating daily tasks is no easy feat. It's going to require buy-in from just about everyone in your business. That's because your people serve as the key to forging into the future with a digital mindset – they'll be the ones to enable a truly successful digital transformation.

### Digital Maturity Matters:

*“Higher-maturity organizations are nearly three times more likely than lower maturity organizations to report net profit margins and annual revenue growth that are significantly above the averages in their industry.”*  
– Deloitte

# What is Digital Maturity?

Dig·i·tal ma·tu·ri·ty

*noun*

a measure of how prepared an organization is to understand and adapt to ongoing digital change.

To experience a fruitful digital transformation, you must first introduce a cultural shift among your team. Too often organizations adopt modern tools and platforms, only to discover their business lacks the digital maturity to deliver the intended (i.e. transformative) result.

With this in mind, a move toward digitization might be better defined as adopting new practices and ways of thinking that keep your organization effective within the digital landscape. This means having a good grasp on how digital processes influence all aspects of your day-to-day business, from leadership, to office culture, to constituent experiences.

## Why a Digital Maturity Assessment is Important

Digital transformation can be a complex and multifaceted journey. A digital maturity assessment helps organizations identify gaps, establish areas of focus, and where to begin. Performing an assessment helps organizations recognize their level of readiness to transform across all areas, which is crucial because differing levels of digital maturity will merit different approaches. The scale for digital maturity evaluates how well companies have incorporated digital

processes into their operating models and how accomplished they are in executing on digital initiatives. Moreover, digital maturity also indicates whether an agency can adapt to disruptive technology, market trends, and competitors in their field (both culturally and operationally). A Deloitte study shows us that higher levels of digital maturity is frequently correlated with improved financial performance.

By conducting a digital maturity assessment, you can create an effective tool for your business that identifies clear guidelines for your digital transformation journey.

# How to Conduct a Digital Maturity Assessment

Each digital maturity assessment should be a comprehensive look at four key areas:

- Strategy
- Technology
- Operations
- Culture and Adoption

With a proper digital maturity assessment, you can gauge where you are in the present moment to help determine where you want to go and how you'll get there. Below are the critical components to conducting an effective assessment for your organization.

## Strategy

The first step in assessing your organization's digital maturity is to assess your strategy for digital transformation as a whole. Your digital transformation strategy should be in sync with your overall business strategy.

- How will digital initiatives drive business transformation?
- Do you have a clear road map for where you're headed?
- Do you have a vision for how your operations will be upgraded?
- Is the team in support of your vision for digital transformation?
- What resources are needed to drive your transformation strategy?



## Vision

COVID-19 made it very apparent that organizations need the ability to work digitally, as it emphasized the value of access to digital content and the ability to support employees and serve customers remotely. Moreover, the reduction in the workforce made it clear that automation is needed and is here to stay. That's why your vision for the future should consider the many benefits of digital processes — like significant cost savings from operational efficiencies, better protection for your most confidential files, and better service delivery for your customers.

Deliberate and define what you want to accomplish and how soon you need to get there. Consider what other factors come into play when outlining your vision for automating digital processes? Having a clear vision around the outcomes you want to achieve can make or break the success of process automation.

“Having a clear vision around the outcomes you want to achieve can make or break the success of process automation.”

## Support

Do you have the support you need to implement and automate digital processes? Who do you need support from and how do you get it? What does your approval process look like? And how will your organization's culture play into getting people on board to support these efforts?

These questions can have a huge impact on your overall digital transformation strategy. Without support it can be challenging to make fundamental changes in an organization. Gather support while building and aligning your strategy, this makes the effort less painful when implementing your strategy.

## Resources

Even with a well-defined vision and a supportive team, you'll still need a variety of resources to help you get there.

What resources are needed to oversee the strategy and implement your digital initiatives?

Do you have time and budget to accommodate the shift?

Each of these resources — from staffing, to scheduling, to finances — has a profound impact on your ability to carry out digitization in the most streamlined, cost-effective manner.

## Technology

With your strategy in tow, it's time to evaluate what technology you'll need to support your digital transformation. Technology is foundational to a successful digital strategy. The right technology should be low cost with low overhead and should support the creation, processing, storage, security and exchange of data.

The market is flooded with an assortment of on-demand architectures to help you meet the needs of your customers while remaining agile in the midst of an ever-evolving digital environment. Look for software and systems that easily configure your workflows, integrate with your existing systems and processes, and enable secure collaboration between teams and departments. The right tools are sure to enhance your productivity and drive better, more productive experiences for employees and customers alike.

### Evaluate IT Readiness

To fully evaluate your agency's IT readiness, you'll want to look closely at the infrastructure and investments needed to support your digital transformation efforts.

- First, consider the technologies that are already in place - will they support your vision for the future or do they hinder your ability to move forward?
- Does your current tech setup intelligently capture information from physical and electronic formats?

- Examine the existing capabilities with regards to storage, integrations, bandwidth, usability, security and the ability to upgrade with ease.
- Consider how usable your data is at present, and if your system enables secure access for remote employees.

The answers to these questions will deliver insights about your readiness to tackle the next steps of digital transformation.

### Consider Cloud-Related Policies

Cloud policies are those guidelines companies follow when they operate within the cloud. While they're typically used to help guarantee the integrity and privacy of company-owned information, cloud policies are also leveraged for financial management, cost optimization, performance management, and network security.

More specifically, the Cloud First Policy was created in hopes of accelerating the pace of the government in recognizing the value of cloud computing. This policy requires agencies to evaluate safe and secure cloud computing options prior to making any new investments.

Complying with technology policies and mandatory guidelines will be pivotal to the success of your agency, and yet, staying compliant along these lines can be

confusing and difficult. That's why it's so important to spend time in your digital maturity assessment before you bring on new technology to consider what cloud-smart/cloud-first policies your agency needs to comply with and how your technology partner fits in.

## Operations

Digital process automation can help provide operational stability for organizations. By eliminating errors such as displaced documents and missed process steps due to human error, your operations become significantly more efficient. This gives your employees the ability to provide more value to the organization and better experience for your customers.

## Identify Processes for Automation

Considering which business processes to automate can help provide insight to a necessary foundation for long-term success of a digital transformation. We've found the most effective way to answer this question is by using an impact effort matrix as a tool. This is a process within the maturity assessment that helps organizations assess the level of effort required and the potential impact or benefits of automating their processes.

The result is a visual representation that helps organizations better understand where to best assign time, budget, and resources.



# Impact Effort Matrix

In an impact effort matrix, each of the potential processes falls into one of these four categories:

1. **Quick Wins:** The clearest return on effort.
2. **Major/ Foundational Projects:** Longterm return but may be complex and time- and resource-consuming to execute.
3. **Fill-ins:** Don't require significant effort nor benefit.
4. **Time Wasters:** Time-consuming efforts with little benefit that should be avoided.

An impact vs. effort analysis helps you quickly identify which processes to tackle first, as well as the ones you should ignore. Here's how you develop your impact effort matrix:

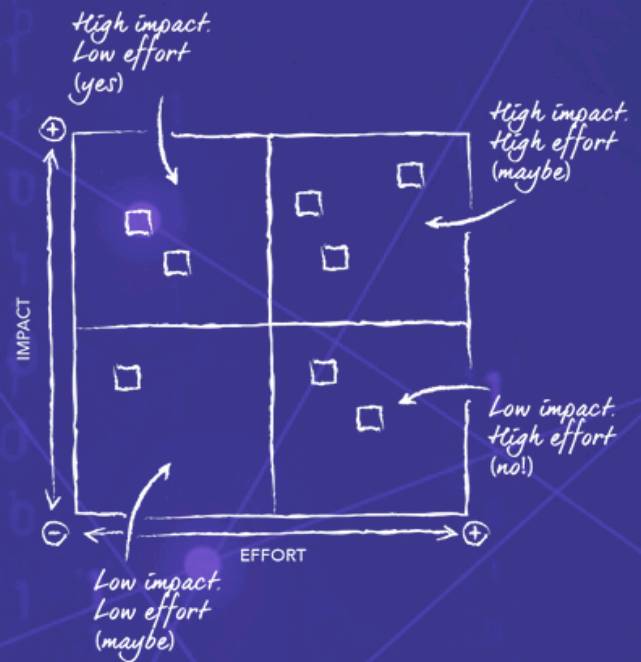
## Level of Effort (Horizontal Axis)

Determine and plot how much time, money, resources, and capacity will be needed to achieve the desired outcome.

## Level of Impact (Vertical Axis)

Ask and indicate how much value or impact the outcomes will have on business.

The result is a simple 2x2 matrix, with each paper-based process you are considering digitizing categorized into one of four quadrants for an easy-to-assess representation of your priorities in four categories.



By focusing your effort on a healthy distribution of Quick Wins and Major/ Foundational processes, you set up your overall digital transformation for success. We've found this is a great alignment exercise to do with stakeholders. Empowering everyone to participate in assigning value to the priority processes and choosing their positions on the matrix creates immediate support. This also provides the opportunity to debate the placement if someone has a differing perspective, generating long-term stakeholder buy-in for the overall initiative early in the effort.

And finally, don't get stuck in the details. Remember to always consider the big picture when identifying and prioritizing processes for digitization. Determine the assets, technologies, and people involved. Note efficiencies, cost savings, and your ability to serve constituents and clients when choosing the processes to digitize. From beginning to end, take a holistic, long-game approach.



## Culture & Adoption

Digital process automation also involves a cultural shift among your team. And this shift within your office is likely to demand clear communication among coworkers, designated training time, and thorough instruction or education on your new operating methods and/or digital procedures.

### Cultivate a culture of digital to foster adoption

To cultivate an innovative, digital culture, focused on delivering exceptional experiences you need to first consider the current state of your company's culture.

- Are you operating within a customer-first culture, a lean culture, or perhaps a culture of quality?

- Are most employees still working with paper documents and paper-based processes?
- Is leadership willing to champion the change and drive commitment across the organization?

Once you have a better understanding of where your culture currently sits on the digital spectrum, you can build a plan that integrates change management. This will help you better understand how to support the move from awareness to understanding to adoption of your digital strategy. Encouraging employees to share innovative ideas throughout the transformation as well as making sure they understand how these changes will benefit their roles will further enhance your adoption efforts.



## Conclusion

Digitization is so much more than a buzzword; it's a necessary process to help agencies and organizations transform their operations, keep pace with their competitors, and provide a superior customer experience. But digital transformation goes beyond building the technology infrastructure and automating core processes — it also requires cultivating a company culture where innovation is both welcomed and emboldened at every stage.

Once you've completed a digital maturity assessment for your agency, it'll be time to find a digital partner. And ultimately, you want to work with a company you can trust, and one who understands this process inside and out. Docufree has been delivering innovative solutions to tackle paper and process challenges for more than two decades.

Our team is ready with the expertise, experience, and technology needed to deliver your digital strategy. What's more, Docufree has created tools and resources to help you understand the benefits of digitization and automated workflows, including guides for implementation and real-world success stories about other agencies who have successfully implemented digital document management.

As you begin your digital journey, we'd encourage you to dive into our Guide to Going Digital, and then feel free to contact us for further insights on digital optimization.



## About Docufree

Docufree is a services-led leader in digital transformation solutions including: large-volume document capture; data extraction and integration; intelligent process automation; cloud-based document management; and Enterprise Digital Mailroom services. Today, over 2,000 enterprises and government agencies rely on Docufree to empower their workforces with the information they need and ensure processes are executed with speed, accuracy, and compliance from wherever work needs to happen. For more information, visit [www.Docufree.com](http://www.Docufree.com). Follow us on LinkedIn and X (formerly Twitter) @Docufree, then like us on Facebook.

