XONIK

TEMPLATE

Digital Transformation Roadmap Template

A template for a digital transformation roadmap that starts from the change in how work is done, puts it in order, and says what ends as well as what begins.

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For	A transformation lead or COO structuring a roadmap.
Use with	The Digital Transformation Maturity Assessment on the XONIK website and the Automation Opportunity Register.

How to use this template

Write your own entries in the boxes and tables, on screen or on the printed pages. The small notes under a label say what to write. Where a section asks for a sentence or two, the text in [brackets] shows what it should cover. A roadmap is a set of decisions about sequence. Write each phase as what will work differently in the business, and say what stops as well as what starts.

> **Guidance**
> Someone reading a list of projects learns what is being built. A roadmap should tell them what changes for them, in what order, and when the old way ends. The guidance boxes are notes for you and are not part of the roadmap.

1. The change we are making

[One or two sentences: what will work differently in this organization when the transformation has landed, and why it matters.]

The change, in a sentence or two

Function	What will work differently	Owner who reports on it

> **Guidance**
> Write one entry for each function the transformation touches. If you cannot say what will work differently, that function has a project and no change yet.

2. Scope

In scope: [functions, processes and systems]. Out of scope: [what a reader might assume is included and is not].

In scope

Out of scope

3. Where we are now

Describe the work as it runs today, with the people who run it, rather than as it was designed to run.

Area	Where we are	Evidence	Gap to close
Processes Which processes are mapped as they run, and which are not			
Systems Which tools overlap, which data disagrees			
Data Who owns what, and how current it is			
People and adoption How people use the tools now, and how that is measured			
Governance How decisions are taken today			

4. The roadmap

Mark a phase done when the work has changed, whatever the project plan says.

Phase	Goal	What changes in the work	What stops	Owner	Starts	Done when
Phase 1						
Phase 2						

Phase	Goal	What changes in the work	What stops	Owner	Starts	Done when
Phase 3						
Phase 4						

Guidance
Put a date on the day each old route stops, because a new tool running beside the old one gives the data another place to disagree. If you have more phases, add rows on a copy of the page.

5. Sequence and dependencies

[Say what must be true before each phase can start: data that must be reconciled, approvals, people who must be released, and phases that depend on others. Name the dependency that would delay everything if it slipped.]

Sequence and dependencies

6. Systems: what we introduce and what we retire

New or changed system	Replaces	Retired by (date or phase)	Owner

7. People and adoption

People who will use the new ways of working help to shape them, and are prepared for them before they start. [Describe who is involved in the design, how people are prepared and supported, and how adoption is measured, in terms of whether the work the change targeted has changed.]

People and adoption

8. Governance

Item	Decision
Steering group and meeting rhythm Members and how often	
Who decides when two projects compete for the same people or budget The named role and the criteria	
What a team may change without asking The boundary	
Escalation route Who, and how quickly	
Where the map of dependencies is kept, and who updates it The place and the owner	

9. Risks

Risk	Effect if it happens	Owner	What we will do

10. How we will know it is working

[List the changes in the work that will show progress, and when each will be checked. Pick measures that show the work has changed rather than that people have been busy.]

What will show progress, and when each is checked

11. Communication

Audience	What they need to know	When	From whom

Review log

Date	What changed in the roadmap	Why	Agreed by

Limits of this template

XONIK wrote this template as a working aid. It is general guidance, not legal advice, and it certifies nothing. Adapt it to your organization, and have someone qualified to advise on the rules that apply to you review it before you adopt it.