DIGITAL WORKPLACE
STRATEGY & DESIGN
The Workbook

This workbook is based on the pragmatic and proven methodology for strategically developing the digital workplace described in the book Digital Workplace Strategy & Design.

The purpose of the workbook is to help you develop skills in this methodology by using its templates, instructions, and examples. It was created specifically for use in the Digital Workplace Strategy & Design Masterclass taught by Oscar Berg and Henrik Gustafsson. Read more at www.berggustafsson.com

"A great guide for how your organization can plan and design the digital workplace for the future of work."

Jacob Morgan — Best-selling author, speaker, and futurist

OSCAR BERG & HENRIK GUSTAFSSON

DIGITAL WORKPLACE

STRATEGY & DESIGN

**A STEP-BY-STEP GUIDE TO AN EMPOWERING EMPLOYEE EXPERIENCE**

A WORKBOOK FOLLOWING THE STRATEGY PROCESS

This workbook is designed to complement the book 'Digital Workplace Strategy & Design' and focuses on the strategy process described in the book. Its purpose is to provide you with practical support in carrying out several key activities that are part of the strategy process.

To achieve this goal, the workbook is divided into the different steps of the process, with each step describing several activities. You will learn the purpose of each activity, which models and templates to use, and how to use them.

To guide you, the templates are filled with real-life examples. These examples are intended to inspire you and are not exhaustive. We have included examples from different types of organizations and have tried to select those that we believe are easy to understand.

However, as the templates are already partially filled in, you will need to use separate templates when working on your own organization.
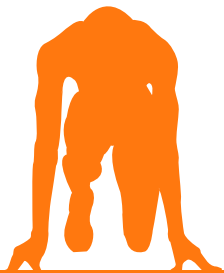
| START-UP | CURRENT STATE | FUTURE STATE | ROADMAP | COMPLETION |

TABLE OF CONTENTS

START-UP

1 MAP THE STAKEHOLDERS

2 ASSESS MATURITY

3 IDENTIFY INTERNAL DRIVERS

4 DEFINE THE MISSION

5 DEFINE THE VISION

CURRENT STATE

1 ASSESS THE DIGITAL EMPLOYEE EXPERIENCE

2 IDENTIFY USER GROUPS

3 DEFINE USER GROUPS

4 MAP DIGITAL CAPABILITIES

5 MAP DIGITAL SERVICES

6 MAP DIGITAL PLATTFORMS

7 MAP INFORMATION ASSETS

8 SUMMARIZE THE CURRENT STATE

FUTURE STATE

1 EXPLORE EXTERNAL DRIVERS

2 MAKE THE VISION CONCRETE

3 DEFINE AND PRIORITIZE GOALS

4 DEFINE USAGE SITUATIONS

5 CAPTURE USER GROUP NEEDS

6 DEFINE THE OFFERING

7 ASSESS THE DELIVERY CAPABILITY

8 SUMMARIZE THE FUTURE STATE

ROADMAP

1 IDENTIFY AND PRIORITIZE ACTIONS

2 CREATE THE ROADMAP

COMPLETION

1 RUN A RETROSPECTIVE

1. Start-up

1. MAP THE STAKEHOLDERS

2. ASSESS MATURITY

3. IDENTIFY INTERNAL DRIVERS

4. DEFINE THE MISSION

5. DEFINE THE VISION

START-UP

CURRENT STATE

FUTURE STATE

ROADMAP

COMPLETION

1 MAP THE STAKEHOLDERS

After realizing the need for a new or revised digital workplace strategy, it's crucial to engage and involve the relevant stakeholders in the strategy process.

This activity aims to identify who the stakeholders are, how they are relevant to the process, and how each of them should be involved in the strategy development.

How to proceed:

1. Brainstorm about possible stakeholders.

2. For each identified stakeholder, describe the following:

   What are their roles?
   What they mainly work on?
   What are the main challenges they face in their current position?

3. Place each stakeholder in the Interest and Influence Matrix.

Tip. Create a mind map to facilitate the brainstorming of possible stakeholders.

The template shows some examples of roles that an international telecom company chose to have in its stakeholder matrix.

STAKEHOLDER PROFILING MATRIX

HIGH INTEREST

EMPOWER TO BECOME CHANGE AGENTS

- Super users
- Business managers
- Learning Manager
- Support

RECRUIT TO THE CORE TEAM

- Digital strategist
- CMO
- HR Manager
- Business developers
- CIO

LOW INTEREST

EVANGELIZE & INVOLVE

- Administrative Manager
- Quality Manager
- Sales people

SHOW PROOF OF SUCCESS

- CFO
- Head of Security

LOW INFLUENCE

HIGH INFLUENCE

(2) ASSESS MATURITY

By using a maturity model, your organization can gain a quick overview of its current standing and the path to future growth. This tool can also be used to compare your business to competitors or other similar businesses.

The goal of this activity is to develop an understanding of where the organization needs to go and the amount of work required to achieve its goals.

How to proceed:

1. Position where the organization is in the maturity matrix and discuss the implications of this.

2. Assess the location of significant competitors or other comparable organizations and position them.

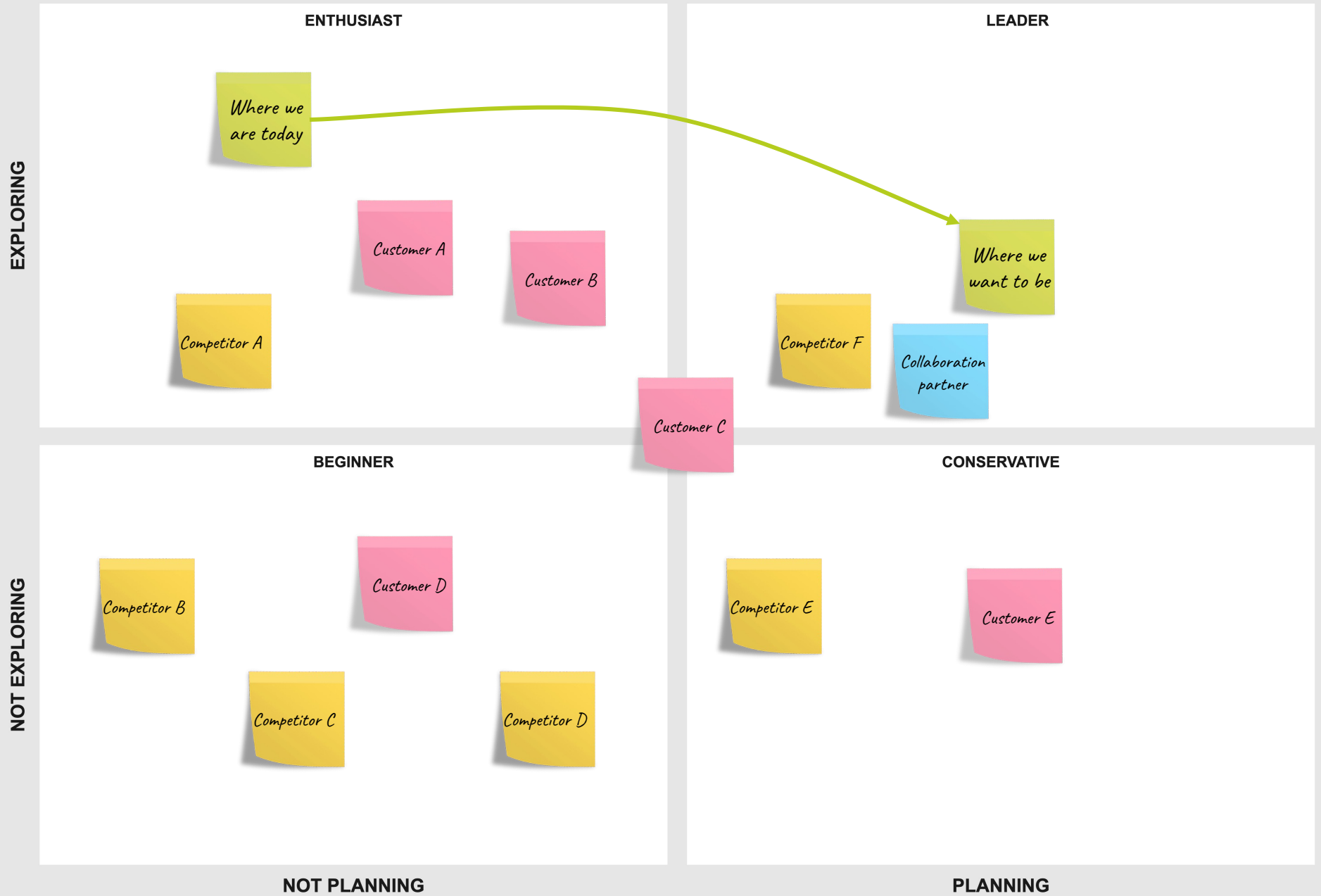3. Discuss the organization's ambition levels and the timeframe for achieving them.

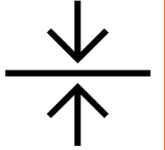Tip. Let each person highlight where they think the organization is and explain why. Discuss!

The example is taken from a consulting company that used the maturity matrix to describe where they were, and the desired movement based on the positions of key customers and competitors.

3 IDENTIFY INTERNAL DRIVERS

Linking the digital workplace strategy with other business, staff, and IT strategies, as well as major ongoing initiatives and programs, is crucial.

This activity aims to identify which of the organization's strategies have an impact on the digital workplace and how. The outcome of this activity is what we refer to as internal drivers.

How to proceed:

1. Review the evidence gathered and notes from any interviews and identify important key concepts. Look for business strategies, focus areas and challenges.

2. Group any similar keywords into themes.

3. Now formulate the internal drivers based on the identified key concepts and how they affect the digital workplace.

4. Prioritize the internal drivers in relation to each other.

Tip. This activity can also be used to harmonize existing strategies in areas such as HR, Communication and IT.

The template provides some examples of keywords that a cross-functional team from an insurance company identified during a workshop.

INTERNAL DRIVERS

STRATEGIES

- Increased customer orientation
- Agility
- Attractive employer
- Sustainability - people and environment

FOCUS AREAS

- Agile team
- Better customer service
- Increased self-leadership

CHALLENGES

- Complicated systems
- Slow decision-making
- "Reinventing the wheel"
- Location-based work

HOW THESE INFLUENCE THE DIGITAL WORKPLACE

- Improve the Employee Experience
- Supporting work-life balance
- Making ideas and knowledge visible
- Facilitate networking
- Mobile solutions
- Support learning in small steps
- Reduce admin and waste
- Offer an internal labor market
- Making it easier to follow processes

4 DEFINE THE MISSION

It's essential to have a clear understanding of the role that the digital workplace will play in the organization's operations. The role should align with the organization's overall mission and set the direction for the digital workplace.

This activity aims to define the mission of the digital workplace, which should answer three main questions:

- **Purpose**: What should be provided?
- **User segment**: Who is the target audience?
- **Means**: How is the service delivered?

Note that contemporary trends and technological concepts should be avoided.

How to proceed:

1. Start by looking at the organization's overall mission to see if and how it can be referenced.

2. Brainstorm answers to the questions the mission should answer. Add these to the template.

3. Discuss and prioritize the answers to find the most relevant and important ones.

4. Summarize and formulate the assignment in a single sentence based on the answers.

Tip. Find out and be inspired by the missions that other organizations have formulated for their digital workplaces.

The example is taken from a global consumer electronics company. The assignment was formulated during a workshop with representatives from several business areas.

MISSION CANVAS

WHAT WILL IT DO?

- Effective Collaboration
- Effective Communication

FOR WHOM?

- Co-workers
- Consultants
- External partners

HOW?

- Digital Services
- Accessible
- Secure
- Mobile
- Easy to use

WORDING OF THE MISSION STATEMENT

Provide digital services that enable effective communication and collaboration for employees and other stakeholders in a simple, accessible and secure way.

⑤ DEFINE THE VISION

The vision for the digital workplace is a future state that the organization aims to achieve, ideally beyond five years.

A good vision:

- Describes the desired future state of the digital workplace
- Creates a vivid mental picture for everyone who hears it
- Motivates and captures people's interest

This activity aims to formulate a draft vision to guide the rest of the strategy work. At this stage, a textual version is adequate. The vision is then refined and enhanced in the Future State step when you have a better understanding of where you need to go."

How to proceed:

1. Brainstorm how the digital workplace can create more value given its mission. Add the ideas to the template.

2. Identify the characteristics that the digital workplace should have to create this value. Insert these in their place in the template.

3. Organize and prioritize the identified values and characteristics.

4. Try to summarize and formulate the vision in a single sentence using the highest priority values and characteristics as a basis.

Tip! Use the maturity analysis as a starting point to find a reasonable level of ambition for the vision. It must be achievable even if it is far away.

The example is taken from a global consumer electronics company. The assignment was formulated during a workshop with representatives from several business areas.

VISION CANVAS

WHAT PRINCIPLES SHOULD IT LIVE UP TO?

- Increase knowledge sharing
- Build trust through transparency
- Facilitate decentralized decision-making
- Encourage and support increased creativity
- Increase agility
- Getting more people to contribute

WHAT VALUES SHOULD IT BE BUILT UPON?

- Easy to use
- Secure
- Relevant
- Accessible
- Inspiring

WORDING OF THE VISION STATEMENT

An inspiring and collaborative digital workplace that enables innovation and engagement across all borders.

NOTES

2. Current State

1. ASSESS THE DIGITAL EMPLOYEE EXPERIENCE
2. IDENTIFY USER GROUPS
3. DEFINE USER GROUPS
4. MAP DIGITAL CAPABILITIES
5. MAP DIGITAL SERVICES
6. MAP DIGITAL PLATFORMS
7. MAP INFORMATION ASSETS
8. SUMMARIZE THE CURRENT STATE

CURRENT STATE

START-UP

FUTURE STATE

ROADMAP

COMPLETION

1 ASSES THE DIGITAL EMPLOYEE EXPERIENCE

The digital employee experience is the overall experience an employee has while using digital tools and systems at work. It encompasses the experience of using the digital work environment over time.

This activity aims to create an understanding of how employees generally perceive the digital work environment, i.e., what the current digital employee experience looks like.

How to proceed:

1. Gather input from employees on how they experience the digital work environment using appropriate techniques such as surveys, interviews, observations and focus groups.

2. Organize this input, discuss and try to identify what characterizes the experience of the digital work environment in the current state.

Optional: Add keywords regarding the organization's values and brand in the relevant place in the template to compare the actual employee experience with what the organization wants the employees to experience.

Tip. The template can also be used to capture an individual employee's experience. Try having some employees fill in the template as a basis for this activity.

The example comes from a global consumer electronics company and is based on input from a number of workshops and an open-ended questionnaire sent to all employees.

EMPLOYEE EXPERIENCE

THINK

Does not see or care about us

I cannot influence

Embarrassing for a tech company like ours

A company for those making presentations and walking

DO

Looking for other solutions "Shadow IT"

Do as you see fit

Not using the systems we have

THE CURRENT DIGITAL WORKPLACE

FEEL

Resignation

Frustration

Reluctance towards certain suppliers

SAY

Do not understand our needs

Slow, unstable and poor access

Systems are for the company, not the users

Poor search function

The tools do not work well together

There is no strategy

No one has asked what we need

Built for Microsoft users, not Linux users

2 IDENTIFY USER GROUPS

Understanding the users and their needs is crucial to determine the capabilities they require from the digital workplace, including how they should function, appear, and be provided.

This activity aims to identify user groups, i.e., users with similar needs and expectations of the digital workplace and its services.

How to proceed:

1. Start by listing the roles that exist in the organization and place them where they best belong among the four different user segments.

2. Try to find roles that have similar needs and behaviors and create user groups for them. Give each user group a name.

3. Describe each user group by creating a user profile.

4. Prioritize the user groups among themselves to identify whose needs are most important to meet.

Tip. Use materials such as organizational charts and role descriptions to identify roles.

The example is taken from an international company producing oil products. The business had a variety of user groups, some of which are shown on the next page. The example shows selected user groups and has not been prioritized.

USER SEGMENTATION MAP

LEADING	ADMINISTRATIVE WORK	SPECIALIST WORK	FIELD WORK

LEADING
- Business Manager
- Store Manager
- Project Manager

ADMINISTRATIVE WORK
- Payroll Administrator
- Office Administrator
- Support Agent
- Customer Service Agent

SPECIALIST WORK
- Product Developer
- Business Developer
- Technical Support Specialist

FIELD WORK
- Maintenance Worker
- Salesperson
- Operator

③ DEFINE USER GROUPS

The purpose of this activity is to gain a deeper understanding of the identified user groups and document this understanding for further strategy and design work.

This includes identifying the typical tasks that users in the current user group perform, the devices they use, and the usage situations they commonly encounter.

How to proceed:

Describe each user group by creating a user profile and document the following in the appropriate section of the template:

1. Typical tasks that this user group performs in their work.

2. Usage situations that the user group needs to access the digital workplace services when performing their work.

3. Digital devices that the user group normally has access to in the different use cases.

4. Success factors for this user group to succeed in their work.

Tip. Among the use cases, it can be useful to list the different situations where individuals within the user group need to cooperate with others.

The example is an excerpt from a profile created by representatives from a retail chain with practical experience in retail work.

USER GROUP PROFILE

NAME

Salesperson

DESCRIPTION

The salesperson is the face of the business. The daily work of a salesperson in a store means that you will alternate between meeting customers, working at the cash register and in the warehouse and picking up goods.

"Customers should always feel welcome and that they can learn something from us"

TYPICAL QUOTE

TYPICAL TASKS

- Check work schedule and store status
- Receive deliveries
- Participate in morning meeting
- Open the shop
- Sit at the cash register
- Serve customer

DIGITAL DEVICES

- Desktop computer
- Cashier
- Smart mobile
- Kiosk

TYPICAL USAGE SITUATIONS

- Home
- Collection point
- Staff room
- Cashier
- The store floor
- Warehouse

SUCCESS FACTORS & CHALLENGES

- Clear communication
- Common routines
- Fewer and simplified systems
- Quickly find info
- Better planning and handovers
- Mobile access

23

4 MAP DIGITAL CAPABILITIES

Digital capability refers to a set of digital services and ways of working. The digital workplace revolves around capabilities in the following five areas: information, communication, collaboration, workflows, and improvement.

This activity aims to map the current digital capabilities to meet the needs of user groups.

How to proceed:

1. Ask the following questions for each capability and record the answers in the appropriate place in the template: What services/tools are provided? Are there common ways of working?

2. Then assess how each capability works today on a scale from 1 to 5, with 5 being the best.

3. Also note the current problems and challenges and any ideas on how to improve the capability.

Tip. Use the capability model described in the book for this activity.

The example is a sample taken from an international organization working on aid for people living in poverty.

DIGITAL CAPABILITIES MAP

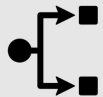|	SERVICES		WAYS OF WORKING
INFORMATION	MS Office, OneNote, OneDrive, Outlook, Teams SharePoint, Public 360 Dropbox, Slack, Intranet...	Often used from many different locations. High volume information is shared with colleagues and partners.	Difficult to access. Limited space . Lack of guidance . Email used for file sharing
COMMUNICATION	Slack, MS Teams Outlook, WebEx, MS Skype, Intranet, Telephony, SMS, FaceTime...	Used daily. Emailing dominates. Different employees use in different ways	Too many tools. Ignorance. Emails stress, overload and breaches information security...
COLLABORATION			
WORKFLOW			
IMPROVEMENT			

5 MAP DIGITAL SERVICES
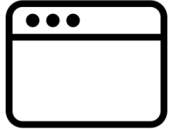
Examining the current digital services can provide a quick understanding of the needs that the digital workplace is currently fulfilling.

This activity aims to identify and classify the existing digital services provided.

It is also an exercise in describing the current digital workplace as services that add value to the users, rather than as individual systems and programs.

How to proceed:

1. Make an inventory of existing digital services based on available documentation, your own experience, and other sources.

2. Group the services into relevant categories and enter them in the template.

Tip. Use icons or illustrations to describe the different services. This makes them more concrete and easier to distinguish.

The example comes from a global manufacturing company and was compiled during some workshops with participants from the communication and IT departments.

SERVICES CATALOG

CATEGORY: Collaboration

SERVICES

- Teamsites
- Communities
- Wikis
- Discussion Forums
- Video Meetings
- Social Network
- Group Chats
- Planners

CATEGORY: Information

SERVICES

- Word Processing
- Spreadsheets
- Slide Decks
- Tasks
- Support
- Image Editing
- Information Search
- People Search

CATEGORY: Communication

SERVICES

- News
- Blogs
- Videos
- Activity Feed
- Chat
- Email

CATEGORY: Improvements

SERVICES

- Idea Generation
- Surveys
- Change Management

CATEGORY: Workflows

SERVICES

- Expenses
- Time Reporting
- ERP
- CRM
- PLM

CATEGORY:

SERVICES

6 MAP DIGITAL PLATFORMS

A digital platform is a package or group of functionalities. The digital services used within an organization may be based on one or more different digital platforms.

This activity aims to map the existing digital platforms. It is accomplished using a model for digital platforms that is vendor-independent but can be linked to different vendor offerings (e.g., Microsoft 365).

How to proceed:

1. Using the nine types of digital platforms as a starting point and list the vendor offerings your organization has of each type.

2. Map where each vendor offering belongs in the template. If they span several different types, mark this appropriately.

Tip. Document any problems, suggestions and ideas you come up with during this exercise.
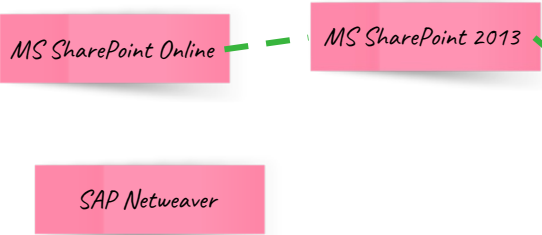
The example comes from a Swedish public authority and shows some of their digital platforms. The data made it clear that they had several competing platforms of the same type and also several versions of the same vendor offering.
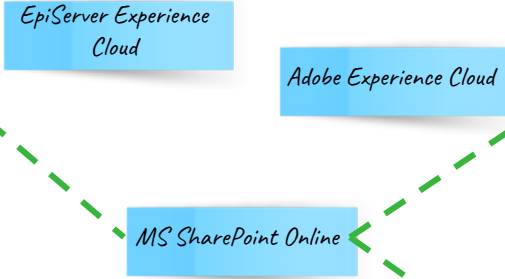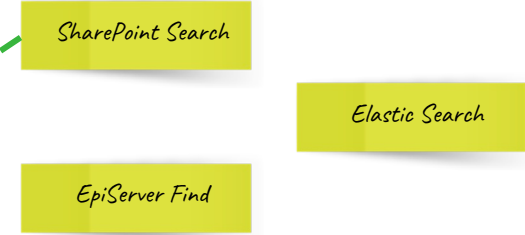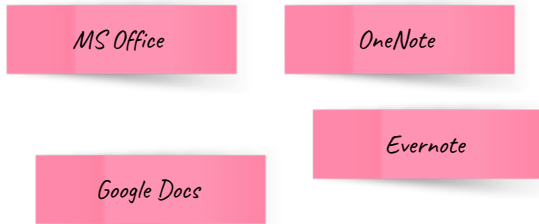
DIGITAL PLATFORMS MAP

PORTALS & APPS
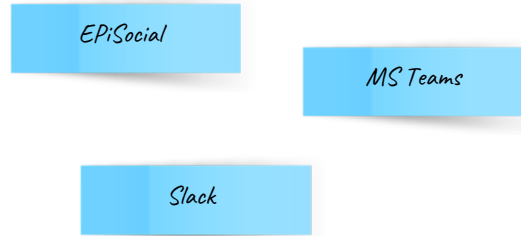
MS SharePoint Online

MS SharePoint 2013

SAP Netweaver

PUBLISHING & EXPERIENCE

EpiServer Experience Cloud

Adobe Experience Cloud

MS SharePoint Online

FINDABILITY

SharePoint Search

Elastic Search

EpiServer Find

PRODUCTIVITY

MS Office

OneNote

Evernote

Google Docs

COLLABORATION

EPiSocial

MS Teams

Slack

CONTENT MANAGEMENT

MS SharePoint

Public 360

EPiServer

LEARNING & IDEA MANAGEMENT

SAP Litmos

WORKFLOW MANAGEMENT

SAP Workflow

Canea

MS SharePoint

BUSINESS INTELLIGENCE & ANALYTICS

MS Power BI

SAP BI
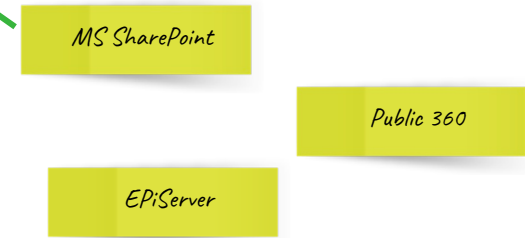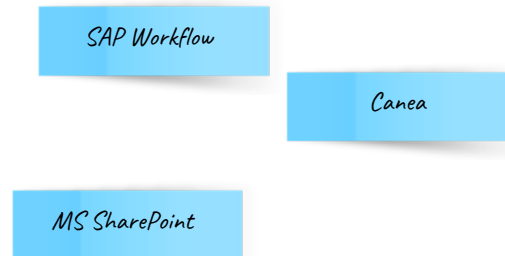
Google Analytics
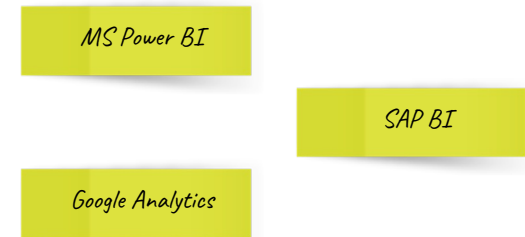
7 MAP INFORMATION ASSETS

Information is the fuel that drives business operations, including communication, collaboration, knowledge sharing, and various business processes. However, not all information is equally important. Some information has significant value to the business, and its absence or poor quality can disrupt business operations.

This activity aims to map information assets, i.e., information with significant value to the business. By examining collections of content, rather than specific content, we can create a high-level map of the most critical assets.

How to proceed:

1. Start listing together what information has significant value for the business. Consider the main content formats: web pages, documents and data.

2. Now consider how the content is intended to be used: management, process, collaboration, personal. Is there any important content that you missed? Add it to the list.

3. Prioritize the identified information assets based on their value to the business.

Tip. Keep it at an overall level and focus on what is requested by the user groups.

The example is from an international consulting company and shows some of their current information assets.

CONTENT INVENTORY MAP

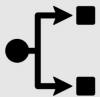|	WEB PAGES	DOCUMENTS & FILES	DATA
MANAGEMENT	Website, Intranet, Manager Portal	Vision & Values, Policies, OrgChart	Financial Data
PROCESS	Support Portal, Process Map	Process Descriptions, Cloud Architecture	Resource
COLLABORATION	Collaboration Spaces, Chat Coversations	Project Plans, Meeting Notes	Usage Statistics
PERSONAL		Reports, Task Lists	Time Reports, Expenses

8 SUMMARIZE THE CURRENT STATE
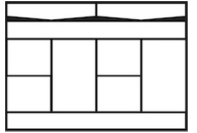
An organization must gain an overall understanding of the digital workplace to develop it in the right direction and address general issues such as redundant functionality and unnecessary complexity.

This activity aims to create an overview of the current state of the digital workplace using a canvas. The canvas displays the most critical aspects and their relationships with each other. It provides a surface for stakeholders to gather around, see the big picture, discuss, and make decisions.

How to proceed:

1. Enter the results of the completed activities in the canvas. If necessary, summarize the information to make room. Use the previous priorities to include the most important information in the canvas.

2. Review the questions asked in the book about each element of the canvas. Discuss the extent to which these questions are answered.

3. Discuss what general problems and challenges you see in the current digital workplace.

Tip. The canvas is intended to provide an overview and a holistic approach. It may therefore be sufficient to list the most important user groups, digital capabilities and so on.

The example shows selected parts of a Current State canvas for a company in the installation sector.

INTERNAL DRIVERS

- Profitability
- Health & Safety
- Sustainability
- Attractive Employer

EXTERNAL DRIVERS

VISION & GOALS

DIGITAL PLATTFORMS

- EpiServer
- CAD System
- Office 365
- Business System

DIGITAL CAPABILITIES

- Project Planning
- Budgeting
- Coordination
- Meeting Management
- Deviation Management
- Material Handling
- Documentation

DIGITAL DEVICES

- Smart Mobiles
- Tablets
- Laptops

USER GROUPS

- Administrator
- Manager
- Project Manager
- Lead Technician
- Technician
- Inspector

INFORMATION ASSETS

- Project Plans
- Procurement Materials
- Work Orders
- Procedures
- Blueprints

USAGE SITUATIONS

- Meeting Rooms @office
- Workplace @office
- Construction Site
- Inside Vehicle

GOVERNANCE & COORDINATION

NOTES

3. Future State

1 EXPLORE EXTERNAL DRIVERS	**5** DEFINE THE OFFERING
2 MAKE THE VISION CONCRETE	**6** DEFINE USAGE SITUATIONS
3 DEFINE AND PRIORITIZE GOALS	**7** ASSESS THE DELIVERY CAPABILITY
4 CAPTURE USER GROUP NEEDS	**8** SUMMARIZE THE FUTURE STATE

FUTURE STATE

START-UP   **CURRENT STATE**   **ROADMAP**   **COMPLETION**

1 EXPLORE EXTERNAL DRIVERS

New digital opportunities continually emerge and must be considered. Since digitalization is mainly driven by external factors, it's crucial to stay informed and understand these factors and prioritize them.

This activity aims to identify and select the trends and drivers that are considered the most crucial and have the most influence on the digital workplace.

How to proceed:

1. List key concepts from your business strategies and place them in the center of the template.

2. Brainstorm the trends and drivers that are relevant to your organization. Go back to previous material that describe the current state and draw from external sources.

Tip. Use the trends and drivers that emerge from a creative exercise to generate new ideas, approaches and solutions for the digital workplace.

The template lists some examples taken from an authority providing various forms of support to businesses.

EXTERNAL DRIVERS

NEW BEHAVIORS & EXPECTATIONS

- Expectation of digital interaction
- Calls for increased transparency
- Improved service

CHANGING EXTERNAL FACTORS

- New regulatory framework
- Sustainability
- Increased complexity

TECHNOLOGICAL DEVELOPMENTS

- Robot-driven process automation
- Artificial intelligence (AI)

HOW THESE INFLUENCE THE DIGITAL WORKPLACE

- Traceability in information management
- Simplify external cooperation
- Facilitate decision-making
- Simplify remote work

2 MAKE THE VISION CONCRETE

The vision formulated in the start-up phase provided direction for further strategy work. Defining the current state requires creating a more concrete vision of the future digital workplace, which can help generate interest and engagement, as well as providing clarity.

This activity aims to solidify the vision with various visualizations and descriptions. This is achieved by imagining a future state, perhaps three years from now, in which the digital workplace has become a success. The outcome is an article and a cover of a popular magazine.

How to proceed:

1. Start from the vision formulated in the Start-up step and the values and characteristics identified in that step. Also use the external drivers noted.

2. Create a headline and an article (spread) that summarizes the story with main headlines, short paragraphs, quotes, fact boxes and success stories.

3. Extra: Illustrate on a separate paper some situations and concrete suggestions on how the digital workplace enables you to work in the future state.

Tip. Avoid referring to tools and technologies. Instead, focus on how the digital workplace is perceived and what it enables in terms of working methods.

Examples show some phrases that a Swedish retail chain developed to concretize the vision for its headquarters' digital workplace.

THE MODERN WORKPLACE WHERE EMPLOYEES FEEL SAFE AND ENGAGED!
Now we know how to harness the collective power of our employees.

"We are developing our digital workplace while creating a harmonious workplace"

Sweden's most creative office with cross-functional teams and engaging meetings.
1st prize Best head office
NMI up 100%

Smart digital technologies make everyday life easier and help employees get the job done.

Ongoing coaching enables you to embrace new digital services and ways of working.

Smart meeting culture
Agile office space
No daily commute by air

Key to success: A flexible and customized digital work environment that creates a sense of belonging and sustainability.

Cover story game, Gray et. al. (2010): Gamestorming - A playbook for Innovators, Rulebreakers and Changemakers. O´Reilly.

(3) DEFINE AND PRIORITIZE GOALS

Clear and well-defined objectives provide guidance on what needs to be prioritized and what changes need to be made. Objectives should express the impact that the organization aims to achieve through the digital workplace.

This activity aims to define SMART objectives that are:

- **Specific:** Clear and concrete, stating precisely what the organization wants to achieve.
- **Measurable:** Progress towards achieving them can be tracked and evaluated.
- **Achievable:** Feasible and realistic, aligned with the organization's resources, capabilities, and priorities.
- **Relevant:** Aligning with the organization's goals, values, and mission.
- **Time-bound**: time-boxed with a realistic timeframe, indicating when they will be achieved.

How to proceed

1. Review the impact of the internal and external drivers on the digital workplace and the concretized vision.

2. Identify goals and prioritize them.

3. Do the following for each of the goals identified:

   - Specify it briefly and concisely using active words such as "increase", "decrease" and "develop"
   - Specify what can be measured, how and when.
   - Assess whether there is acceptance of the goal and among which stakeholders.
   - Assess whether it is realistic or not.
   - Set a time limit for when the goal should be achieved.

Tip. Explore the possibilities of measuring the achievement of objectives with already existing methods, such as employee surveys.

The example is based on an objective formulated for a Swedish authority.

SMART GOAL DEFINITION

SPECIFIC

What do we want to accomplish and why? What are the requirements and constraints?

Increasing employee satisfaction with the digital workplace

MEASURABLE

What do we want to accomplish and why? What are the requirements and constraints?

The target is a 15% increase

Employee satisfaction index measured in annual employee survey

ACHIEVABLE

How can we achieve the goal, what logical steps should we take?

Required to meet the strategy to become a more attractive employer

Trade unions are informed and support the objective

RELEVANT

Will it be worthwhile to pursue the goal? Will it bring us closer towards our vision?

Other organizations have achieved increased employee satisfaction through improvements in the digital work environment and better IT support.

Stress and health issues related to digitalization will increase if nothing is done

TIME-BOUND

How long will it take to accomplish the goal? What is the due date?

The target should be met within 2 years

A significant positive impact should be achieved within 12 months

41

4 CAPTURE USER GROUP NEEDS

To define the future state for the digital workplace, it's crucial to understand the needs it must address and for whom.

This activity aims to provide an overview of the needs of the identified user groups. This is accomplished by asking two main questions:

1. What do user groups want to achieve in terms of "knowing" or "doing"?

2. What do user groups want to experience in terms of "feeling" or "avoiding"?

How to proceed:

1. Try to answer what the user groups need to be able to do and experience in order to do their work. Include these in the needs section.

2. Assess whether the key needs of the user groups have been captured by asking the following questions:

   Will the user group be satisfied if these needs are met?

   If the needs are met, will this contribute to the identified objectives?

3. Then prioritize the identified needs in relation to the previously set objectives.

Tip. Needs are only hypotheses until they are validated with representatives of the user groups. Do this with, for example, interviews and field studies.

The example is taken from a Swedish authority carrying out workplace inspections and shows some of their needs.
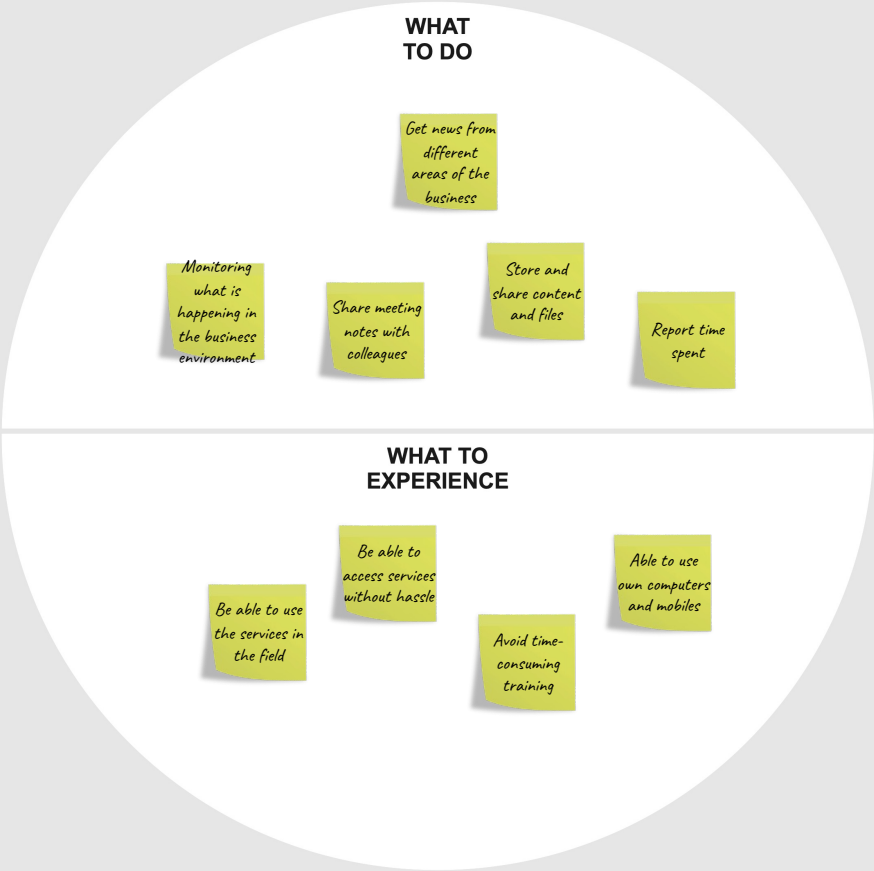
NEEDS & OFFERING MAP

USER GROUP: *Health and safety inspectors*

SERVICES

CHARACTERISTICS

WHAT TO DO

- Get news from different areas of the business
- Monitoring what is happening in the business environment
- Share meeting notes with colleagues
- Store and share content and files
- Report time spent

WHAT TO EXPERIENCE

- Be able to access services without hassle
- Able to use own computers and mobiles
- Be able to use the services in the field
- Avoid time-consuming training

5 IDENTIFY THE OFFERING

A user group's needs in terms of 'knowing' or 'doing' can be met by one or more digital services. Additionally, what they want to 'feel' and 'avoid' provides essential insights into the characteristics that the digital services should possess.

This activity aims to identify the digital content and services needed to meet these needs and the crucial characteristics they should have.

How to proceed:

1. Review the needs of each user group to identify the services and features they require. List these in the offer section.

2. Prioritize the identified services and features in the template according to how the needs are prioritized.

3. Discuss how the offers described will contribute to the realization of the vision and goals.

Tip. Use the employee experience assessment and digital services mapping in the Current State step as a basis.

The example shows user needs and suggestions for digital services that emerged from work with an authority involved in inspections.

NEEDS & OFFERING MAP

USER GROUP: *Health and safety inspectors*

SERVICES

News

Meeting

Meeting Notes

Business Intelligence

File Sharing

Time Reporting

CHARACTERISTICS

Designed for mobile devices

User-friendly

Mobile support

Easy access

WHAT TO DO

Get news from different areas of the business

Monitoring what is happening in the business environment

Share meeting notes with colleagues

Store and share content and files

Report time spent

WHAT TO EXPERIENCE

Be able to access services without hassle

Able to use own computers and mobiles

Be able to use the services in the field

Avoid time-consuming training

6 DESCRIBE USAGE SITUATIONS

Identifying use cases provides insights into how digital services should be provided and used in practice.

Additionally, use cases enable us to communicate how the digital workplace is intended to function, clarifying the desired future state.

Once several typical use cases have been identified, they can be combined to create more cohesive user journeys

How to proceed:

1. Start with a user group and imagine what a day in the future might look like for someone belonging to that user group:

   When, how and where does work begin?
   In which situations does work happen during the day?
   What is the last thing that happens at the end of the working day?

2. List the use cases that emerge from this exercise.

3. Fill in the template for each user situation to better understand the conditions in the current usage situation.

4. Repeat 1-3 for additional user groups.

Tip. Think about how the whole environment can affect what is possible and appropriate to do in a usage situation - is it messy, bumpy, wet, etcetera?

The example in the template is taken from an international construction company whose employees wanted to make better use of their commuting time.

USAGE SITUATION PROFILE

LOCATION

Commuter train

TIME OF DAY AND DURATION

Ca 30 minutes

DESCRIPTION OF THE USAGE SITUATION

Commute by train to work. Take advantage of the time to get started on the workday.

ENVIRONMENT

An environment with life and movement in the surroundings. Most suitable for consuming information or performing simple tasks.

AVAILABLE DEVICES & EQUIPMENT

Wi-fi on the train
Smart phone/tablet
Headphones that remove distracting noise

PARTICIPANTS

Own productive time

TYPICAL TASKS

Check news feeds, important notifications and calendar events
Plan and prioritize tasks
Apply for leave

DIGITAL TOOLS & SYSTEMS

E-mail
News service
Calendar service
Task list
Self-service support

SUCCESS FACTORS

Keep track of the working day and important activities.
Easily perform administrative tasks.

⑦ ASSESS THE DELIVERY CAPABILITY

With a better understanding of the digital services that user groups require, it's essential to consider how these insights impact the capabilities, digital platforms, and information assets that we mapped in earlier steps of the process.

This activity aims to identify any gaps between the current delivery capabilities and those required to achieve the desired future state.

How to proceed:

1. Assess what the new demand expressed in the demand and supply maps requires in terms of changes to the capabilities.

2. Highlight which capabilities need to be strengthened or added and discuss how this can be done.

3. Identify which digital platforms and information assets may be needed to strengthen existing capabilities or enable new ones.

4. Finally, prioritize the capabilities based on the prioritization of objectives, user groups and needs.

Tip. Consider how new services can be realized and how the digital platforms and assets can be consolidated or improved.

The examples in the templates build on the example used in the Current State step. Changes or focus areas are circled with dotted lines.

DIGITAL CAPABILITIES MAP

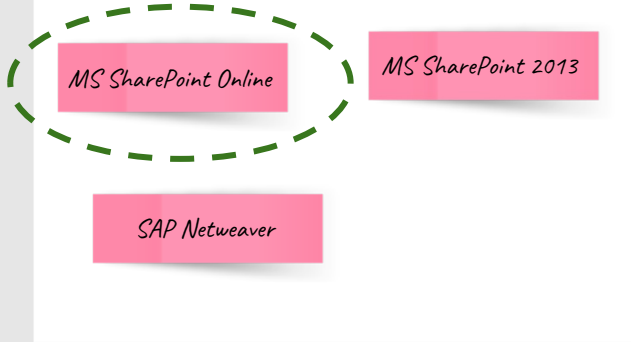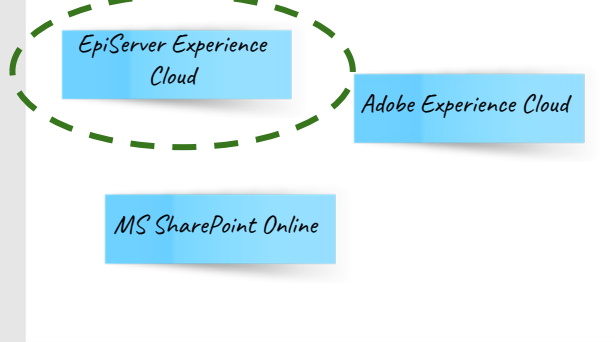|	SERVICES		WAYS OF WORKING	
Prio: 2 **INFORMATION**	MS Office, OneNote, OneDrive, Outlook, Teams SharePoint, Public 360 Dropbox, Slack, Intranet...	Often used from many different locations. High volume information is shared with colleagues and partners.	Difficult to access. Limited space Lack of guidance Email used for file sharing	Inventory the information. Simplify access and search. Visualize waste, risks and costs!
Prio: 1 **COMMUNICATION**	Slack, MS Teams Outlook, WebEx MS Skype, Intranet, Telephony, SMS, FaceTime...	Used daily. Emailing dominates. Different employees use in different ways	Too many tools. Ignorance. Emails stress, overload and breach information security...	Coordinate responsibilities. Clean up the tools. Coach employees in smart ways of working.
COLLABORATION				
WORKFLOW				
IMPROVEMENT				

49

DIGITAL PLATFORMS MAP

◯ *Platforms in focus to reach future state*

PORTALS & APPS
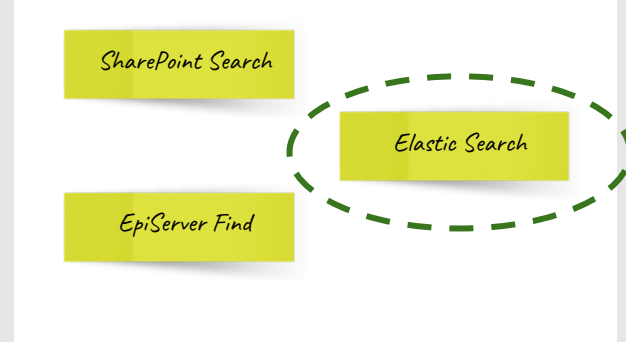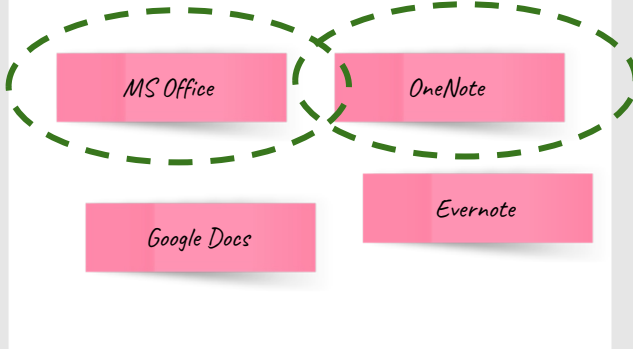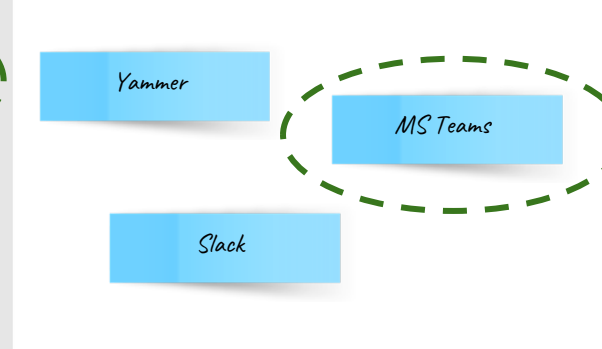
MS SharePoint Online

MS SharePoint 2013

SAP Netweaver

PUBLISHING & EXPERIENCE

EpiServer Experience Cloud

Adobe Experience Cloud

MS SharePoint Online

FINDABILITY

SharePoint Search

Elastic Search

EpiServer Find

PRODUCTIVITY

MS Office

OneNote

Google Docs

Evernote

COLLABORATION

Yammer

MS Teams

Slack

CONTENT MANAGEMENT

MS SharePoint

Public 360

Optimizely

LEARNING & IDEA MANAGEMENT

SAP Litmos

WORKFLOW MANAGEMENT

SAP Workflow

Canea

MS SharePoint

BUSINESS INTELLIGENCE & ANALYTICS

MS Power BI

SAP BI
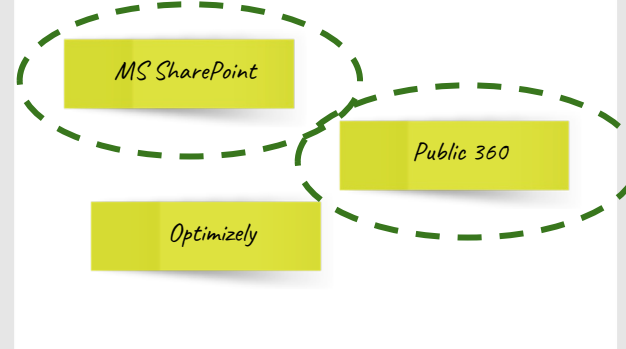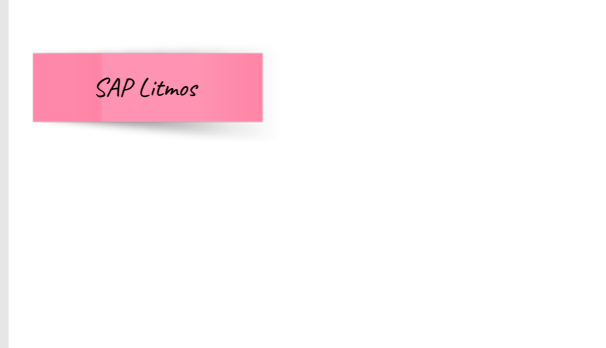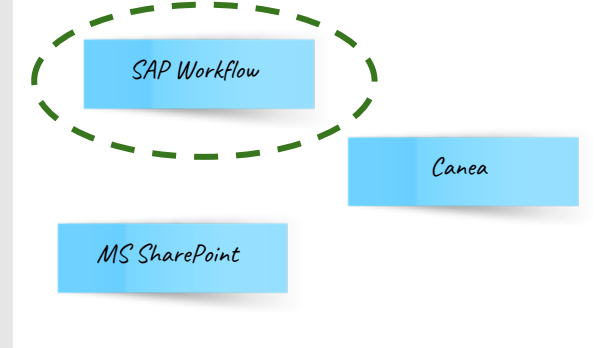
Google Analytics
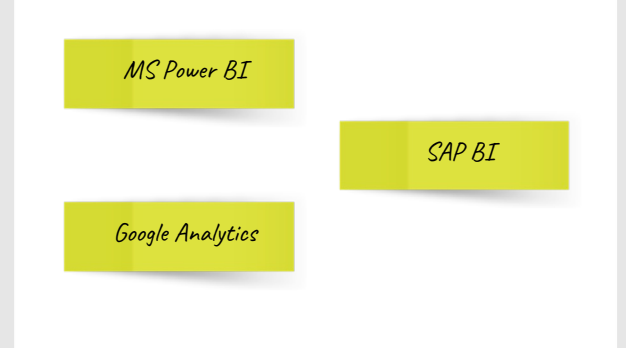
CONTENT INVENTORY MAP

New Information Assets

	WEB PAGES	DOCUMENTS & FILES	DATA
MANAGEMENT	External Website, Manager Portal, Intranet, *News App*	Vision & Values, *Sustainability Strategy*, Orgchart	Financial Records
PROCESS	Support Portal, Process Map, *Innovation Portal*	Concept Development Process, Cloud Architecture, *Whistleblowing Procedure*	*Customers*, Resource Plan
COLLABORATION	Team Sites, Chat, *Competence Forums*	Project Plan, Status Report, *Meeting Notes*	*Workplace Analysis*, Usage Statistics
PERSONAL	*Personal Profile*, Blog, *Curated Content*	*Notes*, Reports, Tasks	Time Report, Expense Report

51

8 SUMMARIZE THE FUTURE STATE

In the Current State step, the results of previous activities were consolidated into a canvas providing an overview of the current state of the digital workplace.

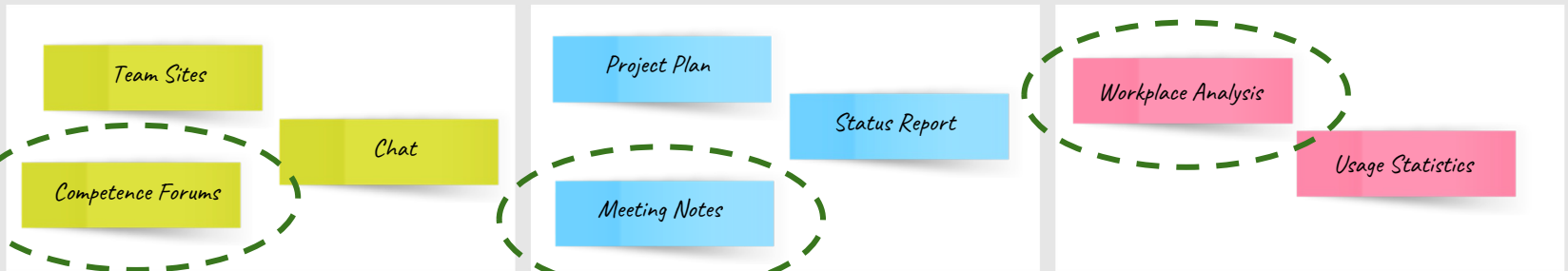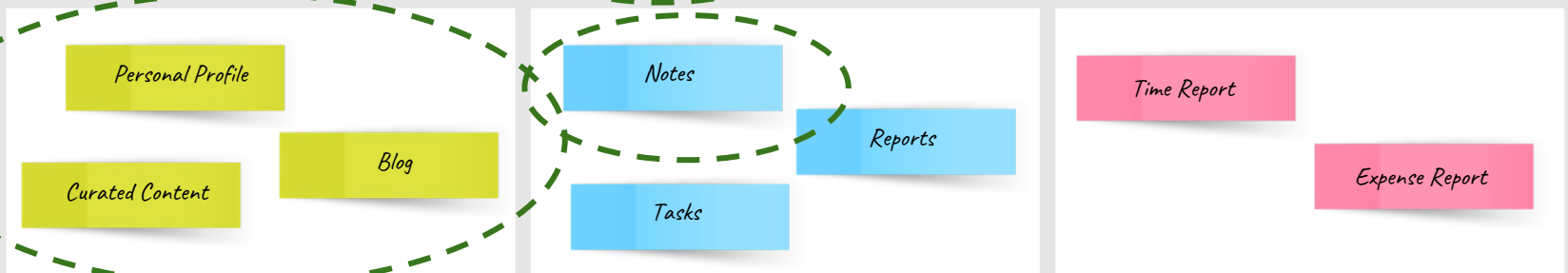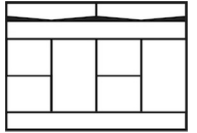This activity aims to create an overview of the desired future state by starting from the canvas created in the Current State step. This approach helps identify the differences between the current and future state, clarifying what needs to change.

How to proceed:

1. Enter the results of the activities carried out in the canvas. If necessary, summarize the information to make room but keep the content at the same level as in the baseline step. Build on previous priorities to include the most important information in the canvas.

2. Mark appropriately what has been added and/or changed compared to the baseline.

Tip. Use icons to make it easier to quickly see and understand what the canvas contains.

The example is based on the same company as the one in the Current State step and is based on a desired state 3-4 years ahead. Green post-its are used to list examples of new digital services etc.

INTERNAL DRIVERS

- Profitability
- Health & safety
- Sustainability
- Attractive Employer

EXTERNAL DRIVERS

- Partnering
- AI
- Automation
- Circular Economy
- Sharing Platforms

VISION & GOALS

An inspiring and collaborative digital workplace that enables innovation and engagement across all borders.

- Increased employee satisfaction
- 15% reduction in material waste
- 100% self-inspection carried out
- Reduced CO_2 footprint

DIGITAL PLATTFORMS

- WCM System
- CAD System
- Office 365
- ERP
- GIS System
- VR/AR Platform
- Issue Management System
- RPS

INFORMATION ASSETS

- Project Plans
- Procurement documentation
- Work Orders
- Procedure Descriptions
- Blueprints
- BIM objects
- 3D Manuals
- Digital Twins

DIGITAL CAPABILITIES

- Project Planning
- Budget Planning
- Coordination
- Meeting Management
- Document Management
- Material Handling
- Work Order Management
- Digital Twins
- Artificial Intelligence
- Measuring
- Deviation Management
- Surveying
- Augmented Reality
- Virtual Reality
- Analytics
- Simulation

DIGITAL DEVICES

- Smart Mobile
- Tablet
- Laptop
- Smart Glasses
- Smart Glove
- Smart Watch
- Smart Mic

USAGE SITUATIONS

- Meeting Rooms @office
- Workplace @office
- Construction Site
- Inside Vehicle

USER GROUPS

- Administrator
- Manager
- Project Manager
- Lead Electrician
- Electrician
- Surveyor
- Smart Assistant

GOVERNANCE & COORDINATION

NOTES

4.
Roadmap

1 **IDENTIFY AND PRIORITIZE ACTIONS**

2 **CREATE THE ROADMAP**

ROADMAP

START-UP **CURRENT STATE** **FUTURE STATE** **COMPLETION**

① IDENTIFY AND PRIORITIZE ACTIONS

During the process of describing the current state and defining the desired future state, numerous problems and opportunities for improvement may emerge. Those that are easy to implement and provide high value should be implemented as soon as possible without waiting for the roadmap.

By taking this approach, you demonstrate that the strategy is results-oriented and has an immediate impact. However, other problems and opportunities for improvement may require more time and resources to implement.

This activity aims to prioritize the remaining problems and opportunities for improvement, grouping or dividing them, and planning them in the roadmap.

How to proceed:

1. Go through the actions and assess the value that each could potentially bring to the business and the effort required to implement it.

2. Place each measure in the prioritization matrix. Try to place the actions in the same box in relation to each other's value and effort.

Tip. Implement immediately actions that are easy to implement and provide high value. This will show that your strategy is results-oriented and has an immediate impact.

The template gives some examples of measures identified for a real estate company and how they were prioritized.

VALUE EFFORT MATRIX

DO IMMEDIATELY

Collaboration Spaces

Case Management System

AD Integration

OneNote

PLAN FOR THESE

Robot Process Automation (RPA)

Support Chatbot

Smart Assistant

CONSIDER ACTIONS

WAIT OR AVOID

Find Meeting Room App

HIGH VALUE

LOW VALUE

LOW EFFORT

HIGH EFFORT

2 CREATE THE ROADMAP

The purpose of this activity is to group or split the prioritized ideas and proposals for activities and measures into relevant initiatives and schedule them in the roadmap.

Initiatives providing high value with lower effort or involving the creation of basic conditions should be prioritized and scheduled earlier.

If specific dependencies exist between initiatives, they must be placed in the right order in the roadmap.

If some initiatives may entail higher risks, they should be broken down into smaller, more manageable initiatives.

How to proceed

1. Group or divide activities and actions into relevant initiatives. Try to use the different elements of the canvas as a starting point.
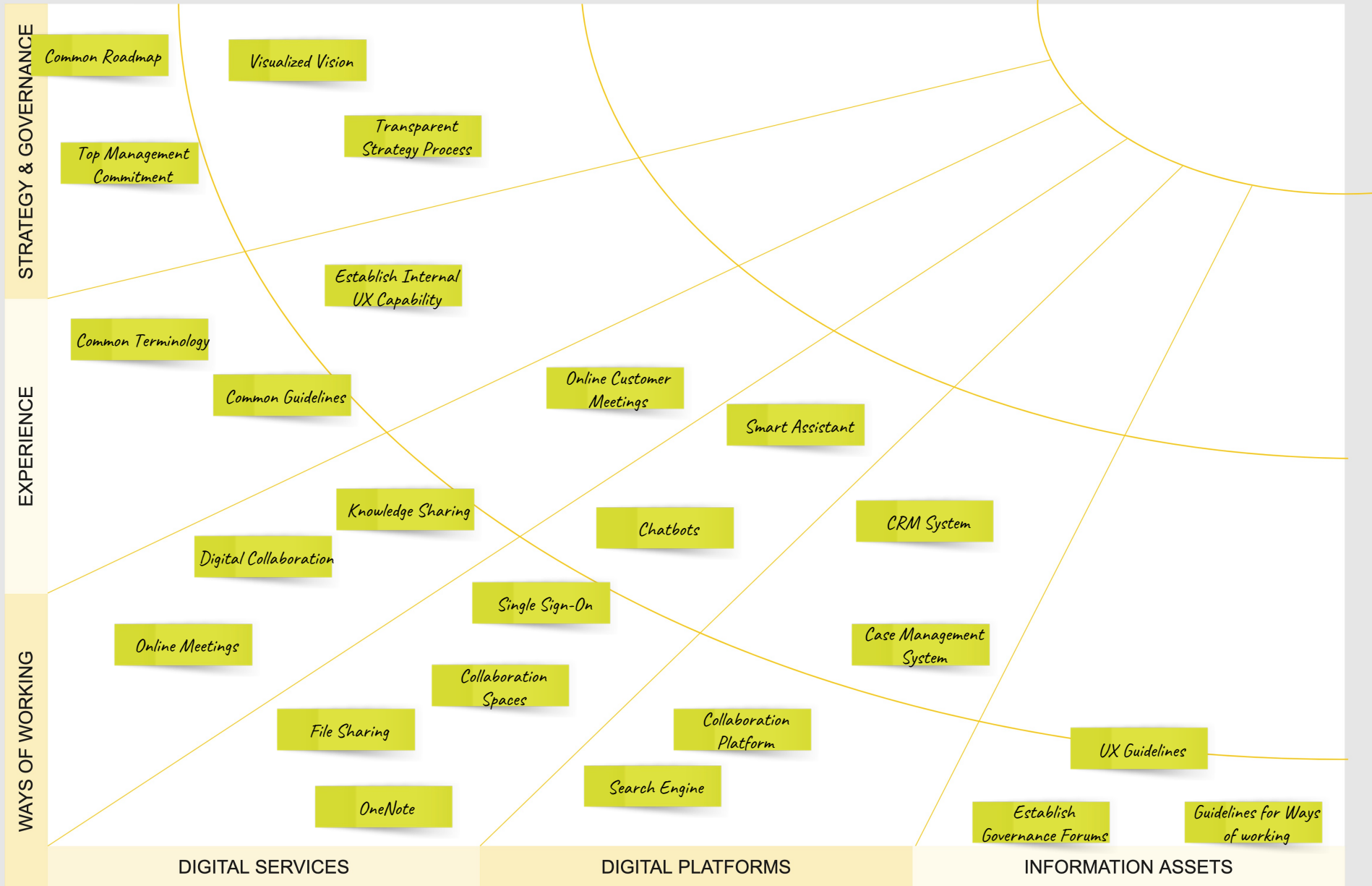
2. Plan the initiatives in the roadmap.

Tip. You can use a different breakdown of the roadmap, or add more dimensions, if necessary.

The example is a simplified roadmap based on a plan developed for a real estate company.

DIGITAL WORKPLACE ROADMAP

STRATEGY & GOVERNANCE

- Common Roadmap
- Visualized Vision
- Transparent Strategy Process
- Top Management Commitment
- Establish Internal UX Capability

EXPERIENCE

- Common Terminology
- Common Guidelines
- Online Customer Meetings
- Smart Assistant
- Knowledge Sharing
- Chatbots
- CRM System
- Digital Collaboration

WAYS OF WORKING

- Online Meetings
- Single Sign-On
- Case Management System
- Collaboration Spaces
- File Sharing
- Collaboration Platform
- UX Guidelines
- Search Engine
- OneNote
- Establish Governance Forums
- Guidelines for Ways of working

DIGITAL SERVICES   **DIGITAL PLATFORMS**   **INFORMATION ASSETS**

NOTES

5.

Completion

1 RUN A RETROSPECTIVE

COMPLETION

1 RUN A RETROSPECTIVE

Before completing the first iteration of the strategy process, it's essential to capture insights and lessons learned. During the retrospective, you can review what went well during the strategy work and identify areas for improvement in the next iteration.

From this retrospective, you can generate suggestions for improving the practical implementation of the strategy work in future iterations

Here's how to do it:

1. Start with the positive. Ask each participant to write down what they think went well on green post-its. Group similar or duplicate items together.

2. Repeat the process with what can be improved and use red post-its. Remind participants that it is about what was done and how, not by whom.

3. Now identify improvements that can be made for the next iteration on blue post-its. Group them and discuss them together, and decide what actions should be taken, by whom and by when.

Tip. Let someone other than the person leading the strategy work facilitate this activity. This can bring out important but uncomfortable truths.

The template gives examples of typical comments that can be made if the representation in workshops is too narrow or if the process is not digitized.

WHAT WORKED WELL?

- Good attitude among participants
- Professionally designed templates
- A clear methodology
- Effective facilitation

WHAT WORKED LESS WELL?

- More informed before workshops
- Are trade union participants required?
- Share documents quickly after the workshop
- Would like to discuss more between workshops

WHAT CAN WE DO BETTER IN THE NEXT ITERATION?

- Create collaborative space
- Everyone does their homework
- Check with the trade union if interested

Congratulations!

Yyou have now completed a number of activities that make up this practical workbook aimed at guiding organizations through the process of developing a digital workplace strategy.

You should now have gained insights into your users' needs, identified gaps in your digital capabilities, and created a vision for a successful digital workplace. You should also have learned how to create SMART objectives, prioritize initiatives, and map out the current and desired future state of your digital workplace.

Don't forget to utilize the insights and lessons learned from the retrospective to enhance the strategy process for future iterations!