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# **Digital Transformation Roadmap - Template**

Welcome to your digital transformation roadmap template. Follow this guide to plan, prioritize, and execute digital initiatives across different parts of your organization.

You’ll find instructions, examples, and fillable tables. You can copy/paste this into your workspace or turn it into a shared document.

Thanks for downloading this template! For more information, visit us at [www.invgate.com](http://www.invgate.com).

## 🔹 Step 1: Define the initiative

Start by scoping each initiative. It doesn’t have to cover your entire business. You can build separate tracks for IT, HR, operations, or customer-facing teams. The important part is being specific about what you’re transforming and why.

| **Field** | **Description** |
| --- | --- |
| **Project / Initiative Name** | Short label to identify the roadmap (e.g. “HR Process Modernization” or “Unified Service Portal”). |
| **Department / Vertical** | Area of the business the roadmap supports. |
| **Business Objective** | Clear, measurable goal this roadmap ties into. |
| **Start Date / End Date** | Expected timeline. |

## 🔹 Step 2: Break it into phases

Each phase should have a clear goal, a few enabling activities, and a way to measure progress. You can define 2-4 phases per initiative, depending on its complexity.

*Tip: Keep your goals narrow. “Improve service delivery speed by 30%” is more useful than “modernize operations.”*

| **Phase** | **Goal** | **Key Activities** | **Tools / Enablers** | **Stakeholders** | **Metrics** |
| --- | --- | --- | --- | --- | --- |
| **Phase 1** | e.g. Map existing workflows | Conduct interviews, document touchpoints | Workflow mapping tool | Operations Manager, IT Lead | % of mapped processes |
| **Phase 2** | e.g. Automate frequent tasks | Identify automation candidates, implement | Low-code automation platform | IT automation team | Tasks automated/month |
| **Phase 3** |  |  |  |  |  |
| **Phase 4** |  |  |  |  |  |

## 🔹Step 3: Identify enablers and dependencies

Now step back and think about the bigger picture. What underlying structure must exist for this transformation to succeed, not just in one phase, but across the entire initiative?

This includes data, process readiness, governance, and any risks you need to manage up front.

| **Element** | **What’s needed** | **Status** | **Owner / contributor** | **Notes** |
| --- | --- | --- | --- | --- |
| **Core data availability** | Accurate asset records, org charts, etc. | Incomplete / OK | IT / HR / Finance |  |
| **Process maturity** | Clear SLAs, documented workflows | Low / Medium / High | Ops manager, process owner |  |
| **Integration capabilities** | APIs, connectors, platform compatibility |  |  |  |
| **Change readiness** | Training, communication plans, leadership buy-in |  | Transformation team |  |
| **Known blockers / risks** | Competing initiatives, technical constraints |  |  |  |

## 🔹Step 4: Tracking progress

Milestones help you stay on track and communicate progress to leadership. Use this table to define what success looks like and who’s driving it.

| **Milestone** | **Target Date** | **Status** | **Owner(s)** | **Notes** |
| --- | --- | --- | --- | --- |
| **Stakeholder buy-in** | July 1 | In progress | CIO | Aligning with HR and Finance. |
| **Tool implementation** | August 15 | Not started | IT | Waiting on vendor sign-off. |
| **Rollout to HR** | September 1 | - | HR Ops | - |
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