

## How to Plan Your Digital Workplace

In 2012, Deloitte defined the digital workplace to be all the technologies people use to get work done in today's workplace. The digital workplace is a challenge given that there are so many technologies available both as on-premises and as cloud or SaaS (Software as a Service) applications. To make matters more challenging, today's worker is not only using technology at work but also at home and in many cases the technology they are using at home is far superior to the technology they have to use in the workplace. There is not a 'one size fits all' for the digital workplace. It must be customized to your organization. This is why you need to plan for it. It is assumed that planning for a digital workplace will be done in conjunction with the IT Department.

### Step 1: Align Your Digital Workplace with Organizational Priorities and Strategic Objectives

- Develop priorities if none are defined for your organization
- Interview stakeholders
- Identify the influencers, and start building relationships that will help with the strategy implementation
- Conduct external research
- Use all available resources

#### *AIIM Tip*

*You may want to start by creating a strategy of a strategy so that you can explain to the stakeholders what you are attempting to do. In reality, you may be working on Step 1 along with Step 2 at the same time. Both of these steps are data gathering steps that will provide the direction for your digital workplace strategy. It is important to ensure that the strategy will address the priorities established for the organization.*

#### For more information

- [The Future of ECM Webinar](#)
- [What is Collaboration?](#)
- [What a Digital Workplace Is and What It Isn't](#)
- [Digital Workplace](#)
- [Five Essential Elements of the Digital Workplace](#)
- [Digital Workplace and Culture](#)

## Step 2: Determine the Employee's/User's Needs

- Schedule workshops to explain and align users to the strategy.
- Conduct surveys to understand their attitude towards technology in general and at work. Gather information to help identify their information needs and what would be most beneficial in helping them to achieve their goals and encourage collaboration.
- Form focus groups and meet with them to talk about what they do. This will provide insight in how to go about making the changes and what changes need to be made.
- Observe or shadow them so you can better understand the needs and frustrations they have with the current technology and how they use the technology.

### *AIIM Tip*

*Given that we are in the era of consumerization where the users are a major technology driver, it is critical to understand the technologies they are using and what technologies they believe would help them to do their work better and more effectively. Try to gain an understanding of what is frustrating your users and begin to help them to discern the benefits of the digital workplace.*

### For more information

- [Putting the “F” back in Social](#)
- [2014: The Year Collaboration Goes Social](#)
- [Requirements Gathering: A Step by Step Approach for A Better User Experience \(Part 1\)](#)
- [10 Techniques for Gathering Requirements](#)
- [Process Approach to Requirements Gathering](#)
- [Business Requirements Gathering and Analysis](#)

## Step 3: Draft a Strategy

Make use of existing IT strategies before drafting a new strategy. If the IT strategy does not include the digital workplace, draft an addendum to the strategy.

- Develop a set of personas that depict the users in the organization - it is best to create 6-8 personas. The personas should be described as individuals based on the characteristics of a group.
- Using the personas, develop a vision for the digital workspace
- Develop a business case for the changes you want to make based on the information collected in steps 1 and 2.

#### AIIM Tip

*This is where you draft your vision of the digital workplace. At the same time, you should also be establishing the business case for what you are proposing. This is only a starting point to use to get the discussion going in your organization. This is a good time to conduct the pilot. Make sure the pilot is well defined and small or manageable. Use what you learned from the pilot to finalize the strategy and plan.*

#### For more information

- [Writing a Good Strategy Doc](#)
- [How to write a Strategic Plan](#)
- [Write a strategy document](#)
- [Strategic Plan Template: What to Include](#)
- [How to Create a Useful Strategy](#)

### Step 4: Feedback from Users

- Meet with the stakeholders to make sure the priorities and recommendations for changes are aligned with their needs are
- Begin investigating technology options
- Define the scope, create an action plan and prioritize

#### AIIM Tip

*Now, the fun starts, you get to start investigating technologies! This work should be performed in cooperation with the IT Department to ensure that the changes will fit the needs of the organization.*

#### For more information

- [Increase Productivity in the Workplace](#)
- [Content Collaboration and Processing in a Cloud and Mobile World](#)
- [AIIM Buyer's Guide](#)
- [The 5 Best Ways to Get Feedback from Your Customers](#)
- [Customer Feedback: 19 Strategies to Get More Feedback](#)

### Step 5: Finalize Strategy and Vision

- Build the communication plan for communicating to the whole organization
- Share the vision across the organization and continue to receive feedback
- Select the technologies for implementation as part of the digital workplace initiative

#### *AIIM Tip*

*This is where you will ensure you have understood the requirements and priorities. At this point, you should also be finalizing your strategy and plan.*

#### **For more information**

- [Is Social Enterprise Dead?](#)
- [Collaboration vs Communication and the importance of purpose](#)
- [How to Develop a Communications Plan](#)
- [Develop a Communications Plan](#)
- [Communications Planning](#)

### **Step 6: Set Up Governance**

- Define how the digital workspace will be rolled out
- Establish an Information Governance Council to establish the policies
- Identify and draft the policies and procedures that are needed
- Set up a governance model
- Build a comprehensive training plan
- Monitor and assess

#### *AIIM Tip*

*Now is a good time to start thinking about and drafting the message you will share with the organization about the digital workplace undertaking that is being implemented. It is also time to review the policies and procedures to ensure they will support the plan. If you have an information technology policy, take time to review it to include the guidelines and procedures for the technology being implemented.*

#### **For more information**

- [What is Information Management?](#)
- [Enterprise Content Management Training](#)
- [How to Plan a Digital Workplace video](#)
- [Information Governance Training](#)
- [Information Management – 2016 and Beyond](#)
- [Information Governance – Too Important to Be Left to Humans](#)
- [Information Governance Policy vs. Information Governance Reality](#)
- [Building the Case for Enterprise-wide Information Governance](#)