

Your Digital Roadmap Toolkit

Congratulations! You've taken the first step towards creating a cohesive digital strategy to turn your business goals from vision to reality.

In this toolkit, you'll find two documents:

1. The one you're reading right now! The first part of this doc will explain how to use the toolkit and the second part contains two sample roadmap formats to provide you with some inspiration.
2. An editable spreadsheet that will help you capture all of your initiatives in detail.



How to create your digital strategy roadmap

1. Decide on the timeframe

We recommend that you focus on the short to medium term. Given how quickly the digital landscape is shifting, it's nearly impossible to predict what things will look like in the long term. We generally find that three years is an appropriate period, with the greatest density of deliverables being in Year One. The more immediate the initiative, the more detail you will be able to provide. Initiatives to be delivered in Years Two and Three can be outlined more broadly, with the finer details to be fleshed out as time unfolds.

2. Determine your streams

The two fundamental elements we typically include in our roadmaps at Luminary are Streams and Initiatives. Streams represent your marketing objectives, and Initiatives are the deliverables (e.g. 'Create a campaign landing page' might be the initiative and 'Convert prospects to customers' might be the objective).

Initiatives can also be aligned to departmental Streams, such as IT, HR or Legal. This helps to conceptualise the necessary involvement of parts of the organisation other than the one driving the digital strategy (usually marketing). If a new technology platform is required, this would be aligned to the IT Stream. Similarly, recruitment requirements would align with the HR Stream.

Initiatives may share more than one stream

but for the purposes of this exercise, each one should be assigned to a primary Stream. For example, you may want to launch an e-newsletter (the Initiative) to help with the twin objectives of customer retention and conversion (Streams), however you might deem retention to be the primary Stream.

3. Work out a structure for your roadmap

There is no set-in-stone formula for structuring a roadmap but we tend to use the following approach:

Visual representation – A high-level visual summary of your roadmap. This serves to provide your audience with an overview of the initiatives within your detailed roadmap. (See the Digital Roadmap Samples in this toolkit for examples of how to set this out.)

Overview – outlining the purpose of the document, its internal custodian, version history and timeframe for review. This section should also provide a summary of the organisation's digital strategy.

Summary – a brief explanation of initiatives, split by years/milestone stages with an overview of the main aims of each year/stage at the beginning of each. Initiative descriptions outline the level of impact (low, medium or high) and any relevant dependencies.

Detailed description of initiatives – a more detailed explanation of each initiative, divided according to relevant streams, including: a

slightly more extensive description, current capability analysis, barriers (e.g. legacy systems), requirements that the initiative must meet, intended outcomes, success metrics/KPIs, sponsor (person responsible), resourcing (e.g. in-house or agency/external), and budget. The Digital Roadmap Matrix included in your Toolkit has been designed specifically for the purpose of setting out your detailed initiatives.

4. Go forth and create!

The aim of your digital roadmap should not be to create a 'War and Peace' style tome. You can have supporting documentation that provides further detail, but the roadmap itself should be a concise and high-level document that is easily accessible to anyone within your organisation.

Best of luck with it, and please reach out to our digital strategy team if you need any help!



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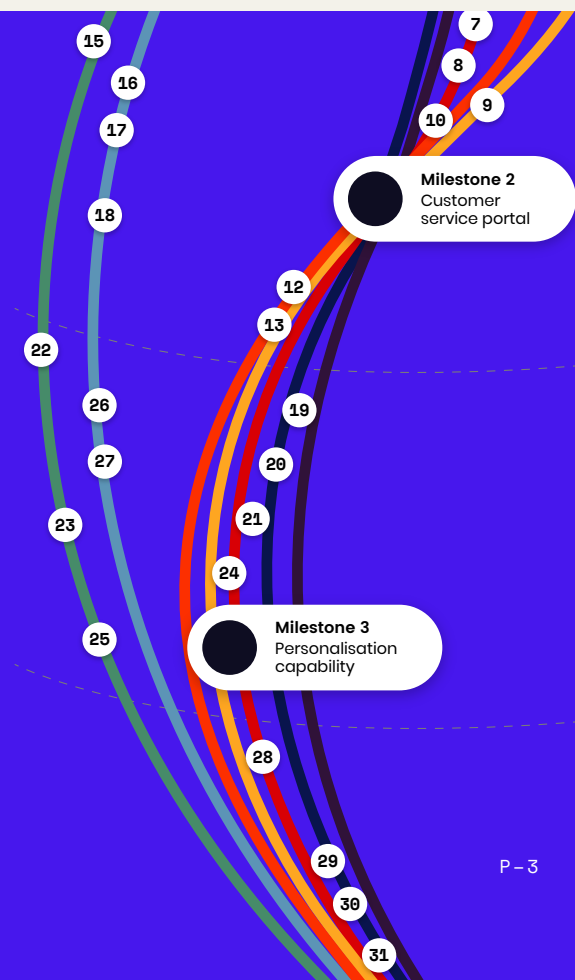
Free introductory roadmapping consultation

Luminary has guided some of Australia's most well-known brands with their digital strategies since 1999. We can deliver a comprehensive roadmapping service specifically tailored to the needs of your organisation.

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Digital Roadmap Samples



Introduction

The following samples are based on a highly abridged version of a full-scale digital roadmap.

They are intended for indicative purposes. Only the first five initiatives of the strategy have been outlined. The samples have been constructed around a fictitious private health insurance provider called XYZ Co.



Diagrammatic representation

This diagram provides business stakeholders with a high level overview of the initiatives required to achieve key milestones of the roadmap.

Often this is helpful in answering questions of senior executives such as “Why can’t we activate personalisation in year one?”

Legend

Digital marketing

- Awareness
- Consideration
- Conversion
- Retention

Operational

- Technology
- Human resources
- Governance



Initiative-based representation

The grid based representation on the following page can be used to represent all initiative titles on one or two pages.

It is more relevant to an audience that cares about the detail, rather than the high level milestones.

This can either be used in addition to, or in place of, the diagram shown on the last page.



	Awareness	Consideration	Conversion	Retention	Technology	Human Resources	Governance
Q1 - 2019	Lead Capture Pages SEM + SEO Audits Campaign ABC		CRO Audit		EDM Platform	CRM Training Data & Web Analytics	Marketing Team Alignment
Q2 - 2019		EDM Sales Kit	Educational Videos		Chatbot Platform Personalisation Capability	Recruit Digital Marketing Manager	
Q3 - 2019	SEM + SEO Audits			Chatbot Service Customer Reward Program			Digital Roadmap Audit
Q4 - 2019		Custom Design Tool		EDM Retention Kit		Digital Steering Group	
Q1 - 2020	Content Personalisation SEM + SEO Audits Campaign ABC		Online Application				Digital Roadmap Audit Q3 & Q4 Recommendations
Q2 - 2020				Customer Service Portal Ongoing Retention Programs			

Overview

This section will vary depending on the nature of the roadmap. It should provide guidelines on how to interpret the document and an overview of the key milestones and implementation strategy. It should also outline the key objectives (streams) that initiatives will be mapped to.

In this example, there are seven core objectives or ‘streams’ that are relevant to the initiatives outlined:

Marketing:

- Awareness
- Consideration
- Conversion
- Retention

Operational:

- Technology
- Human Resources
- Governance (Legal/ regulatory compliance)

Summary

Year One

The roadmap for Year One focuses on improving the user experience and initiation of customer engagement, while building the foundation for ongoing delivery of XYZ Co’s digital strategy across Year Two and Three. (Note: Only the first five initiatives are outlined in this sample strategy.)

No.	Initiative	Objective / Stream	Impact	Dependency
1	Lead Capture Pages	Awareness	Medium	—
2	Educational Videos	Conversion	Medium	1
3	Digital Marketing Manager	Human Resources	High	—
4	Sales & Customer Service Chatbot	Technology + Awareness, Consideration, Retention	Medium	3
5	EDMs	Technology + Retention	High	3



Detailed initiatives

The following pages give a brief snapshot of how detailed initiatives might be set out.

Initiative No.1

Lead capture pages

Stream: Conversion

Description

Develop a series of reusable lead capture pages for key content assets. Prospects can be directed to lead capture pages via content assets promoted through the use of channels such as social media, email and Adwords.

Current Capability Analysis

XYZ Co's website is currently not optimised for lead nurturing. XYZ produces a number of content assets but without lead capture pages there is a missed opportunity to follow up visitors who express an interest in XYZ's content and services.

The current content management system and hosting infrastructure could be utilised to create lead capture pages. XYZ Co does not currently have the in-house capability to develop or deploy this initiative and will have to look at outsourcing options to ensure the initiative's success.

Requirements

The initiative will need to meet the following requirements:

- Reusable lead capture pages developed for various content and visitor types (e.g. members/non-members – with non-member pages containing additional data fields to capture information already

available for members).

- Conform with internal branding and accessibility guidelines
- Include prominent calls to action to encourage the prospect to contact XYZ Co and subscribe to future email updates from XYZ Co.

Outcomes

The lead capture pages initiative is aimed to facilitate a greater conversion rate of prospects to members by building XYZ Co's database of prospective customers.

Success metrics

- Increase in number of qualified leads: target 3% in 4 months
- Volume of data captured with leads
- Lead quality
- Number of email subscriptions

Sponsor

Digital Marketing Manager

Resourcing

Digital Agency

Budget

\$30,000 – \$45,000



Educational videos

Stream: Conversion

Description

Develop a series of videos demonstrating the benefits of becoming a member of XYZ Co.

Current Capability Analysis

It has been identified through the strategy process that XYZ Co's prospects are sceptical about the value of private health insurance. To address these concerns, a series of educational videos are required. XYZ Co does not have the capabilities to develop these videos in house, so outsourcing will be required. The videos would be hosted on YouTube so there is no dependency on XYZ Co technology to support these videos.

Requirements

The initiative will need to meet the following requirements:

- A series of short videos hosted on YouTube
- Each video must highlight the value for a different kind of member, e.g. young single, couples, families, over 50s
- Videos must be able to be embedded across XYZ Co's website and marketing campaigns

Outcomes

This initiative is aimed to assist with conversion of prospective members.

Success metrics

- Number of video views
- Rate of qualified leads who have viewed video (based on internal attribution model)

Sponsor

Digital Marketing Manager

Resourcing

Video Production Agency

Budget

\$15,000 – \$25,000

Digital Marketing Manager

Stream: Human Resources

Description

Employ a Digital Marketing Manager.

Current Capability Analysis

XYZ Co currently lacks a dedicated digital marketing specialist. For the strategy to be successfully delivered over the three-year term prescribed, the appointment of a digital marketing manager is crucial.

Requirements

The successful candidate will need to meet the following requirements:

- Bachelor degree in Business, Marketing or equivalent
- At least 5 years experience in a digital or online marketing role
- Proven track record managing the online customer experience
- Solid understanding of all facets of online marketing including campaign development, tracking, SEM, website development, etc
- Ability to plan, design and implement all online marketing activities tailored to the needs of XYZ Co
- Ability to plan and develop innovative online campaigns and functionality to support XYZ Co in meeting its sales and service objectives
- Basic Web design and development knowledge (HTML, CSS, HTML, XHTML, Java, CSS, Flash, ASP, PHP)
- Advanced understanding of web analytics tools and concepts

Outcomes

This role will work closely with the internal teams and agency redeveloping the XYZ Co website over the coming months and assisting with implementation of XYZ Co's digital channel marketing strategy.

Success metrics

- Specific candidate KPIs to be determined

Sponsor

Marketing Manager

Resourcing

Human Resources Manager

Budget

\$75,000 – \$120,000 (per annum)

Sales and customer service chatbot

Stream: Technology + Awareness, Consideration, Retention

Description

Implement a chatbot on the website (and potentially other channels) to satisfy common queries from both prospects and current customers.

Current Capability Analysis

XYZ Co has no prior experience with chatbot technology or any relevant service providers, however our digital agency has experience in rolling out successful chatbot instances on multiple platforms.

Requirements

The initiative will need to meet the following requirements:

- Conduct research and customer service query analysis to determine the most appropriate set of tasks for the chatbot to achieve – the outcome of this will largely influence the investment requirement (currently a very broad range)
- Evaluate all platforming options with the digital agency – including off the shelf products such as Intercom, or open platforms such as Microsoft Azure Bot Service
- Consider which channels the chatbot should operate on, including the website, the iOS/ Android applications, and the potential of partner websites
- Resolve common queries from prospective customers
- The ability to identify a customer (soft validation of customer for callbacks etc)
- Resolve common queries from current customers

- Support the commerce team with functions such as returns authorisation
- The chatbot application must be trainable over time, to satisfy additional phrases or queries that have been misunderstood by the application

Outcomes

The chatbot should drive conversion through the provision of missing information, and lead to improved customer satisfaction through resolution of common tasks without having to speak to a customer service agent.

Success metrics

- Resolution success rate (based on user feedback and outcomes)
- User query comprehension success rate (understanding users)
- Evidence of a reduction in calls to the customer service team

Sponsor

Digital Marketing Manager

Resourcing

Digital Agency

Budget

\$50,000 – \$100,000



eDMs

Stream: Retention

Description

Create and deploy a regular email newsletter to existing members.

Current Capability Analysis

XYZ Co currently has the internal capability, procedures and systems to develop this initiative without any assistance.

Requirements

The initiative will need to meet the following requirements:

- A bi-monthly email newsletter created by in-house content editors
- Branded with XYZ Co branding
- Highlighting current news, regulatory changes, health tips and encouraging members to keep their details up to date
- eDM embedded with a Google Analytics code for tracking
- Provision of a web friendly version of the eDM

Outcomes

The eDM initiative is aimed to encourage members to stay engaged with XYZ Co and increase their perception of the value of membership.

Success metrics

- Email open rate
- Click-through rates
- Unsubscribe rate
- Bounce rate
- Conversion rate (where applicable)

Sponsor

Digital Marketing Manager

Resourcing

Graphic Designer and Digital Marketing Manager

Budget

\$4,000 – \$7,000

Need help with your digital roadmap?

Contact the mastermind behind Luminary's Digital Roadmapping Toolkit.



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Luminary

Making digital
bright and the human
experience brighter

