

How to Leverage Digital Transformation Consulting



The digital era offers incredible opportunities to transform business processes for the better. But how do you get it right?

How do you engage in the right transformation, minimize risks, and maximize outcomes?

Digital transformation is a unique beast with hidden pitfalls and hidden opportunities.

Luckily, expert consulting can help—especially if you lack expert resources on staff, as our clients often do.

Here's how to get the most out of digital transformation consulting.

Key takeaways:

- Consulting brings an important outside perspective on digital transformation.
- It's difficult to gain this perspective with internal resources alone.
- A consultancy can help you develop your own unique roadmap for digital transformation.
- They can also help you deal with risks and challenges in digital transformation.



1. What is digital transformation?

Digital transformation is the process of redesigning business operations to deliver more value through technology. It's a broad term that can cover anything from an email migration to the introduction of AI.

Since so many things fall under digital transformation, our clients have a wide variety of strategic purposes for such projects. Common goals include:

- Creating new growth opportunities
- Reducing cost and human error
- Giving employees and customers 100% accurate data in every touchpoint
- Creating a better customer experience

Digital transformation projects come in all shapes and sizes. But the key to digital transformation is that it never stops. The healthiest organizations adopt a continuous view of transformation. They pursue one limited, highly achievable project after another.

But how do you define your goals and your path forward with digital transformation?

Global enterprises may have the experts on staff to assist with this. For the rest of us, **digital transformation consulting** is the answer.

2. Why use a consultancy?

Digital transformation comes with numerous benefits, especially when you engage an expert consultancy. With the right partner and the right strategy, you get:

- **Increased efficiency.** Outdated processes and technology often create invisible waste. Digital transformation uncovers and addresses these issues.
- **Decreased cost.** If you're using legacy software for a process—or no software at all—then you're spending more than you need to on that process. Digital transformation uses robust technology to reduce these costs.

- **Better customer experience.** If you're hard to do business with, it may be time to transform your customer experience. Technologies like ecommerce, customer portals, and AI chatbots can empower customers to solve their problems more easily. This builds loyalty and helps differentiate your company from the competition.
- **Better business data.** How can you make strategic decisions without accurate data? Digital transformation empowers you to replace ambiguity with hard data from new technologies. This makes it easier to choose the right course of action.
- **Revenue and profit growth.** When you transform customer experience and internal operations, you attack profitability from two directions. Aligning with customer expectations can increase revenue, while transforming operations can reduce costs. Put these two together, and you have growing profits.

Clearly, digital transformation offers incredible gains to companies that pursue it.

But *how* do you pursue it? Should you keep things in-house or engage a consultancy?

Spoiler alert: Consulting is the most economical way to get the biggest impact from transformation while minimizing the risks.

A good consulting firm knows what's working in digital transformation (and what isn't). They stay on top of evolving trends. With many projects under their belts, they can advise on the right path forward in your unique situation.



Here at Corsica Technologies, we bring 30+ years' experience to the table when it comes to transformation strategy. Our team offers several benefits that you can't get if you do digital transformation strictly in-house.

1. **Access to experts.** If your team has their hands full with day-to-day operations, it's tough to stay on top of emerging trends in digital transformation. Consulting offers an outside perspective that's dialed in to opportunities you may not know about.
2. **A proven process.** A successful digital transformation lives (or dies) by the process you engage for the project. It's essential to uncover every stone and account for the downstream impacts of every change. You could cut your teeth on your own transformation, but it's more beneficial to engage experts (like the Corsica team) who've implemented many transformations. In fact, the right consulting firm should come with a proven process that they can apply to your situation, tweaking as necessary. That's one of our passions here at Corsica.
3. **A roadmap for continuous evolution.** Digital transformation is never finished—because everything from customer needs, to technology, to cybersecurity never stops evolving! When you work with a consultancy, you get a roadmap that looks beyond your initial transformation project. This ensures that you embed transformation into your organization's lifeblood, staying ahead of new trends and always meeting customer expectations.

Here at Corsica Technologies, we've helped hundreds of clients achieve the transformations that matter most.

Learn how [the Honor Flight Network replaced manual paperwork with an automated system](#).

This transformation made it easier than ever for veterans to travel to Washington, D.C., to visit the monuments dedicated to their sacrifice.



3. Trends, risks, and challenges

What does the landscape look like today in digital transformation? Here's what we see as a leading consultancy. Let's talk about current trends, risks, and challenges in digital transformation.

A) Digital transformation trends

Here at Corsica Technologies, we're seeing significant new trends in digital transformation when we consult with clients. All companies are trying to get better at what they do, and technology is a key enabler in that endeavor. Here are the top trends we're seeing.

1. Adopting AI... while taking care to strengthen cybersecurity

From Microsoft Copilot to ChatGPT, AI is here to stay. The question is how organizations can use these tools to increase efficiency, differentiate from the competition, and improve outcomes.

While AI is powerful, it's not a simple matter of launching a tool and seeing results. Two primary concerns come up with this digital transformation trend.

- **Data readiness.** Most organizations keep their data in siloes due to legacy processes and systems. This makes it challenging to leverage AI comprehensively, as the tool needs access to all business data—and that data must be structured properly. For many organizations, the first step is to cleanse and organize their business data before embarking on their AI journey. This is one of the first things we examine in a consulting engagement.
- **Cybersecurity.** Believe it or not, tools like ChatGPT can create cybersecurity issues. Long story short, anything entered in a ChatGPT prompt can emerge in an output for any user. This is one of the biggest reasons we recommend that Microsoft customers use [Copilot rather than ChatGPT](#), because Copilot protects customer data in a way that ChatGPT doesn't.

Large global enterprises may have the resources on hand to deal with these challenges in-house. For the rest of us, it usually makes more sense to engage in [AI strategy consulting](#) to ensure your organization is prepared (and to get the most out of AI).

2. Fixing data integration issues for good (especially EDI)

Lack of data integration causes significant issues in today's fast-paced business environment. In fact, integration is one of the biggest trends we see in digital transformation. These issues hurt, no matter what part of the organization they affect.

But there's one area that's especially problematic. It's **EDI integration**. EDI technology processes essential documents like purchase orders, invoices, advance shipment notices, and more. In numerous industries, EDI is the lifeblood of a company and its relationships with trading partners. When EDI integration breaks down, the operational impact is immediate—and painful.

Our clients come to us to get leaner, more reliable performance through EDI. Though EDI is an older technology, this essential integration is a dominant trend in digital transformation.

3. Transforming customer experience with digital technology

Across numerous industries, customers want efficient, seamless experiences when they interact with a supplier. Gone are the days when picking up the phone was an acceptable way to get things done. Self-service, efficiency, and transparency are the name of the game.

What does that mean in terms of technology? The answer depends on your industry and your customers, but here are some initiatives we see frequently as we consult with clients.

- **AI chatbots for customer experience.** If a customer can get intelligent answers to a question without having to pick up the phone, they gain back valuable time in their day.
- **Self-service portals and ecommerce.** The more control you can give the customer, the better their experience—and digital technology is a key piece of that experience. Web portals and ecommerce place the customer in the driver's seat, which is where they want to be.
- **A better EDI experience.** This is related to B) above, but it's worth noting that functional EDI technology directly impacts customer experience. Ultimately, EDI errors and exceptions can create friction for buyers. In the worst case, buyers may switch to the competition.

These are only a few prominent trends that we're seeing. Get the full picture here: [Top 6 Digital Transformation Trends](#).

B) Risks associated with digital transformation

No doubt about it, digital transformation comes with risks—and even the best strategy can encounter challenges. Here's what we see with our clients, plus how we minimize risks and overcome challenges.

1. Lack of buy-in from all stakeholders

Some transformation projects affect only one part of an organization, but most projects touch several parts—if not the entire company.

If you don't include all stakeholders, there's a risk that some people won't adopt new technologies and processes. It's tough to get people to change if 1) they don't see what's in it for them, and 2) they don't feel like they had a seat at the table.

The solution is to build an early coalition of stakeholders—then keep everyone involved, every step of the way.

This is why we use a proven process for cross-functional collaboration here at Corsica. Our goal is to get everyone involved, speaking up, and contributing to the final outcome in a healthy way.

2. Strategy that works today, but not tomorrow

Here's a curious thing in digital transformation—almost a contradiction:

The best companies view transformation as a continuous exercise.

Yet a transformation project that isn't future-proofed can cause more harm than good down the road.

It's a tough thing to get right—which is one reason to engage a digital transformation consulting company. Here at Corsica, we help you lay a durable foundation that doesn't stay static, but rather empowers future transformation. And we do it without creating technical debt, which is so important in this environment of continuous change.



3. Bandwagon strategy may not be right for you

Digital transformation can create a herd mentality. But the trends that dominate TED Talks and LinkedIn may not be right for every organization.

Here's a great example. As cloud technology gained prominence in the 2000s and 2010s, many leaders in business and IT believed the cloud was right for every use case. This led to migrating all on-premises systems to the cloud.

Sadly, the cloud isn't right for every system. Sometimes it's actually more expensive than hosting things locally. In these cases, on premises may actually be the right approach—which leads to the growing trend of **cloud repatriation or reverse migration**.

So how do you know if you're pursuing real value or chasing a buzzword in digital transformation?

Consulting can bridge the gap. Here at Corsica, our experts bring an outside perspective, auditing your real needs and cutting through the hype. We're passionate about helping companies find the solution that really is best for them—regardless of what's trendy.

C) Challenges of digital transformation

Digital transformation is rarely easy. Even the simplest projects come with complexity, which is one of the reasons to engage a trusted consulting team like Corsica. You want to uncover every potential issue so there are no surprises.

Here are some common challenges we see in digital transformation—and how we overcome them when consulting with our clients.

1. Stakeholders may disagree about transformation

The more complex the organization, the more opinions your team will have. After all, Sales and Operations interact with a given system in different ways—and they have different needs.

It's totally understandable that stakeholders would disagree about transformation. But you can't stay in a place of friction. You need to work through those negotiations and define a viable path forward—one that works for everyone.

Unless you have seasoned digital transformation experts on staff, that process can be challenging. It's one of the biggest reasons to engage in consulting. An expert partner like Corsica can bring all stakeholders to the table and facilitate a healthy dialogue that builds consensus. This is critical to success in digital transformation.

2. Existing processes may depend heavily on dying technology

Sometimes, the driver for transformation is the fact that a critical system has become EOL (end of life). When this happens, it's fairly easy to define the goal in terms of technology. You want to retire that system and replace it with something future-proofed.

3. Lack of in-house talent to facilitate transformation

Most organizations aren't in the digital transformation business. This means they don't have a team of technology specialists with deep experience in digital transformation.

If they do have technology staff, these people may focus heavily on day-to-day support and reactive break/fix requests. It's tough for them to be proactive, let alone develop and execute a strategic digital transformation project.

This is one of the primary reasons companies come to us for consulting. They know they need to engage in digital transformation, but they lack the resources to articulate the why, the what, and the how. And when it comes to execution, they need just as much help.

Here at Corsica, we help our clients through every stage of transformation—from consulting to implementation to support after go-live. Learn more here: [Digital Transformation Services](#).

4. Limited visibility into cybersecurity

Whenever you alter business processes or introduce new technology, you have to think about cybersecurity. While old systems may have been less secure, new systems introduce new attack surfaces that must be accounted for. Certain technologies, like generative AI, may even create net-new cybersecurity risks. Learn more in our post on [Microsoft Copilot vs. ChatGPT](#).

Ultimately, it's best to engage in cybersecurity consulting alongside digital transformation. You need expert consultants who can advise on how transformation will impact security. That's one of the reasons we have a comprehensive team here at Corsica Technologies. We handle digital transformation, cybersecurity, EDI, IT services, and more. Check out [Our Services](#) for the full picture.

5. Scope creep

It happens all too easily. You start into a project with one picture of what you need, and by the time you get halfway there, you realize everything you left out.

While scope creep can occur in digital transformation, you can minimize it with smart planning. You can also reduce the impact of scope creep with proven processes for digital transformation. When you engage in consulting from Corsica Technologies, you get 30+ years' experience and expertise informing your project. This ensures the project sticks to the original goal and remains achievable.

4. Strategies and roadmaps

How do you find your way with digital transformation?

How do you know what your organization needs today—and where you need to go tomorrow?

Digital transformation strategies and roadmaps will get you there. These concepts are closely related, but it's worth looking at each one separately.

A) Digital transformation strategy

Few things are more **strategic than digital transformation**. After all, you're asking, "How could this process run better, what technology will support it, and how to we implement that technology successfully in the context of our people and operations?"

The question is complex—and the answer is often even more complex. Clearly, digital transformation is a core piece of overall business strategy.

When we work on a digital transformation consulting project, we typically ask clients a set of pointed questions. These questions help uncover key strategic opportunities (and pitfalls) in digital transformation.

Here's what we ask.

1. What do you want to get out of this transformation?

In other words, what does success look like?

This is a key question. It uncovers the business drivers for the project. If there are actually no business drivers, this question will reveal that fact.

2. What discrete processes will this transformation impact, and how do those processes affect the operations of every department?

The bigger the transformation, the bigger the impact—yet even smaller projects often touch more than one department. It's essential to consider the total operational impact of a transformation so you can plan accordingly.

3. How do your competitors handle the process that you want to transform?

It can be tough to get this information. But if you have it, it's great to benchmark yourself against the competition. Are you catching up to a trend, sitting in the middle, or riding the front edge of the wave? How do customers feel about the process in question? Will transformation make you more competitive and better differentiated?

4. What is your company culture like today? How will your people react to transformation?

Every organization has its own culture. Some embrace change, while others struggle with it. Ultimately, transformation affects people directly, and it's important to bring everyone into the fold. If you have naysayers on the team, you actually want to bring those people in from the start. It's essential to listen to their concerns, as they may help uncover potential issues that you didn't know about. These people need a seat at the table to help influence the project—and to buy in after their concerns are heard.

5. How can you start small?

Here's the dirty secret of digital transformation. The bigger the project, the more complex it is, the more likely it is to fail—especially if you don't engage an expert consulting company.

We often advise clients to start small. The best transformations happen in successive waves, with each wave laying the foundation for the next incremental change. Approaching things this way gives you time to adapt, handle cultural issues, and work out any kinks. It's a smart way to approach transformation, and it's what we recommend here at Corsica Technologies.

B) Roadmaps and frameworks

Clearly, digital transformation demands structure. It involves new technologies, modified processes, and an impact to operations and company culture. Only the small stuff!

Here at Corsica Technologies, we start with proven **digital transformation frameworks** to help clients reap the benefits of digital transformation while minimizing the risks. But we recognize that every company is different, and cookie-cutter transformations often fail.

This is why we consult with our clients to develop a 3-year **digital transformation roadmap**. This living, breathing document outlines where we're going in terms of digital transformation—and what it will take to get there.

Why take a roadmap approach? Because it offers benefits you can't get any other way.

- **Strategic direction.** You shouldn't engage a transformation project just because of buzzwords or trends. If there isn't a strong "why"—i.e. a business case—then the project may not be justified. A 3-year roadmap helps the organization define strategic objectives for transformation. It gives you a framework by which to say, "This project succeeded—or failed."
- **An end to budgeting surprises.** Without visibility into what you need (and when you need it), you can't plan ahead financially. A 3-year roadmap helps you prepare now to support your digital transformation journey.
- **A process for building consensus.** We can't finalize a roadmap with a client until all relevant stakeholders agree. The process of getting there helps to iron out differences, build consensus, and provide alignment across the organization.
- **A cybersecurity-first approach.** If your consulting partner specializes in cybersecurity as well as digital transformation—as Corsica does—then you'll get cybersecurity baked into your roadmap. This is a massive benefit, especially considering the growth in cyberattacks across all industries.
- **An iterative, achievable path.** "Big bang" transformations are risky. This is why we encourage clients to start small—and take small steps after that. A 3-year roadmap can help you move from where you're at today to your ideal state—all while minimizing risk and giving your people time to embrace and celebrate change.



5. Services and tools

What does digital transformation look like in real life? Who does the work of digital transformation, and how? Let's talk about services and tools for digital transformation.

Digital transformation services

Someone has to execute the work of digital transformation. If you have specialists on staff with nothing else to do, you can probably handle digital transformation in-house. However, most organizations don't have these resources. They need the [services of a digital transformation partner](#)—from consulting all the way to support after launch.

Different service providers may specialize in different types of transformation. Here are the most common services that our clients request.

Cloud migration

The cloud has changed the way business gets done. And while it isn't right for every system, the cloud offers tremendous advantages in the right scenario. This is especially true when you take a *services* approach, rather than a *server* approach to the cloud.

Since these migrations are complex, you need an expert partner with deep experience. The right partner can also handle [cloud managed services](#) for you after launch.

Reverse cloud migration (aka “cloud repatriation”)

As cloud technology has risen to prominence, another trend has emerged alongside it. Sometimes, organizations find they were too aggressive in moving to the cloud. A particular system may actually work better in an on-premises model, both in terms of cost and complexity.

In these scenarios, our clients often come to us looking to reverse a cloud migration that they executed with a different service provider. Learn more here: [Reverse Cloud Migration \(i.e. Repatriation\)](#).

Data integration

The more complex your operations get, the more you need integrations across systems. Yet the more complex your operations get, the more difficult it is to achieve (and maintain) integration!

Our clients often come to us with systems that have never been integrated—or with integrations that have broken down. [Data integration](#) requires a smart, strategic approach, plus support services to keep everything running smoothly.

AI strategy consulting

The power of AI is here. But how do you leverage it at your organization, embedding it within your unique processes?

There’s much to know about AI. You want to [assess your AI data readiness](#) as well as cybersecurity. Consulting on AI is one of the biggest trends in digital transformation that we’re seeing. Read more here: [AI Consulting Services](#).

ERP and CRM consulting

Backend systems are essential to smooth operations and business growth. That's why many business transformation initiatives focus on essential backend systems and integrations. Two types of consulting are especially important here:

- [ERP consulting services](#)
- [CRM consulting services](#)

Custom software development

Sometimes off-the-shelf software just won't work. It may be too expensive, too inflexible, or too complex (or too simple!). It all depends on your unique needs.

For these reasons, custom software development is one of our most popular services in digital transformation. The key is to account for support after launch, which is one of the reasons we offer a comprehensive team of experts from IT, cybersecurity, and EDI.

Digital transformation tools

You can't transform your processes and culture without digital tools that support better ways of working. And while there aren't many "one size fits all" transformation tools, it's worth understanding what's out there so you can choose the right path.

Here are some of the most common tools we use with clients.

A) Tools that facilitate digital transformation projects

- **Project management software.** Digital transformation can get pretty complicated. You'll need a tool that can handle the complexity, show you how sub-projects are linked, track status, and assign team members to tasks. Project management tools like Microsoft Project, Asana, Monday.com, ClickUp, Wrike, and others can bring much-needed structure to your transformation.
- **Vendor/client collaboration software.** Some projects may require frequent real-time communication. In these cases, shared Slack channels or collaboration in Microsoft Teams can help keep your team and the vendor's team aligned.

B) Tools you can launch as part of a digital transformation initiative

Rather than assisting with a digital transformation project, these tools are the project—from a technical perspective. They are the systems that get launched to digitally transform a process (or an entire business).

Here are the most common software tools that our clients launch as part of a transformation initiative.

- **AI and ML tools.** AI offers tremendous potential to increase operational efficiency and differentiate from the competition, but it has to be done right. You need a strong business driver for adoption, and you have to consider data readiness and cybersecurity risks. Read more here: [AI Strategy Consulting](#).
- **EDI solutions and integrations.** EDI (electronic data interchange) is the way business documents are sent and received in numerous industries. EDI solutions require sophisticated technology and integrations to other systems. Even if an organization can already process EDI documents, they usually have room for improvement in terms of integration. Learn more here: [EDI 101](#).

- **Cloud systems like ERP, CRM, accounting, and more.** As the place where “business lives,” backend systems can have a huge impact on operations when they undergo transformation. Common projects in this category include cloud migrations for ERP, CRM, SCM, and other critical systems.
- **Employee experience and intranet tools.** The larger the organization, the more complexity your employees face in going about their day, finding internal resources, interacting with HR, and so on. Intranet tools can provide a single repository for information that helps your team navigate internal processes and policies. In particular, employee experience tools, such as HR portals, can empower your team to view benefits, pay stubs, tax information, and time off requests in one place.
- **Internal collaboration and communication tools.** If you’re still hosting your email with an on-premises Exchange server, it may be time for transformation. Tools like Microsoft 365 and Google Workspace offer a suite of integrated, cloud-hosted collaboration tools and office software in addition to email. These tools are game-changers for organizations that struggle with locally-stored files.







Corsica Technologies offers managed IT and cybersecurity services for businesses throughout the United States. We help companies to align technology with their business goals while minimizing the IT risks to their organizations so they can focus on running their business. One of the nation's leading managed service providers, Corsica Technologies is full service—offering everything from help desk IT support to advanced cybersecurity risk management and compliance.

Ready to learn more about managed technology services?

Schedule a free consultation with our specialists to learn how technology can enable and transform your business.

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