

# Digital Transformation Advisor and Planner (DTAP)

*From Strategic Analysis to Implementation of Strategies*

## ANALYSIS

**DIGITAL TRANSFORMATION ADVISOR**

Strategize your organization's digital transformation with our comprehensive tools and resources.

**GET STARTED**

Suggestion: Before proceeding, please explore the following resources:

- Digital Transformation Tutorial (10 min)
- Watch Video Clip (2 min)
- Detailed Step-by-Step Guide (10 min)

This tool focuses on specific **Learning Objectives**

**BRIDGE**



## IMPLEMENTATION

help Logout

### Welcome to Detailed Technology Planner (PISA)

**NGE-PISA** (Planning, Integration, Security & Administration), is a set of collaborative advisors that help you answer the most crucial questions in IT planning and integration. PISA uses a systematic methodology.

The system consists of the following advisors that collaborate with each other to help small to medium businesses (SMBs):

- Enterprise Modeler:** Helps you develop a high level model of your organization.
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- Platform Advisor:** Recommends computing hardware and software needed to support the applications.
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**PISA Server**

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- Network Advisor suggests a network configuration that includes wireless as well as wired networks.

### Import Digital Transformation Scenario

Following is a summary of analysis with the Digital Transformation Game. If you want to import it into PISA Planner and start a detailed planning scenario based on this, click on the following button.

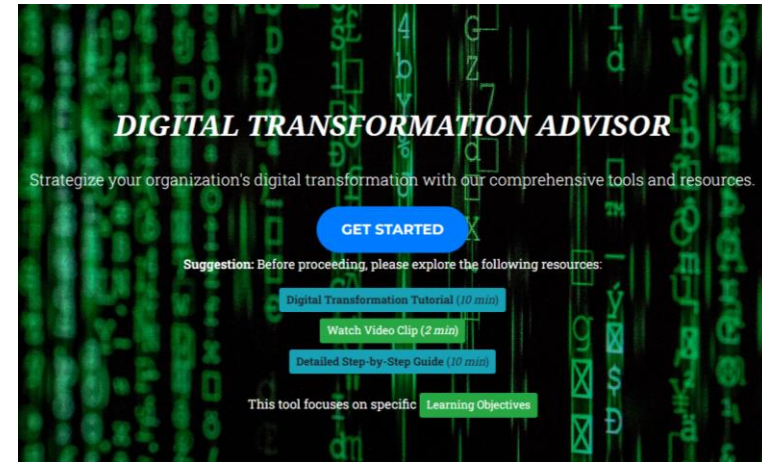
Before proceeding to start PISA, please take some time reviewing helpful material here.

# Highlights of Digital Transformation Advisor

url = [Digital Transformation Advisor](#)

## Top Features of the Digital Transformation Advisor

1. Consists of 4 simple steps and then a quiz
2. Asks the users to specify the objectives of the transformation. This information drives the results.
3. Covers all 191 countries
4. Supports digital transformations in 8 sectors, will include more sectors and initiatives such as smart cities and communities later
5. Suggests a strategic approach based on stages of automation
6. An 10 dimensional model shows which technologies are being used
7. Includes an Assessment Quiz at the end to assure that the users have understood the concepts. Users can try the Quiz many times to improve learning
8. Includes training materials for a Hands-on Training Workshop
9. For OECD countries, the concepts from their Go Digital Toolkit (the 7 factors) are being used, the actual data will be used in the future (V2.0)
10. Currently is being integrated with a detailed planner that could be invoked to produce an actual working system (V2.0)



## Additional Features:

- Includes Learning objectives and a Quiz that is based on the learning objective
- Objective of the game is to get maximum score in the Quiz
- Anyone can use it by requesting a Guest ID
- Each screen has “?” that explains the concepts being used

# Step1: Location and Sector Selection

- In this step, please select a country first, then rural or urban area.
- Then select an industry/organizational sector (e.g., Retail, Health, Manufacturing).
- The system automatically determines the technological and economic status of the location and industry situation in that location. For example, if the country is an OECD, then OECD data is used automatically.
- By clicking on any box in the diagram, you can view short description of the Business Processes and learn more about these industry patterns

NOTE: The information captured in this step will drive many decisions in this intelligent tool. . For example, higher stages of automation (e.g., Stage4) are only feasible in OECD countries. Please try different options to better understand this feature. .

This simple advisor will help you understand different dimensions of transformation and what it really takes to digitally transform an organization

## Step 1: Organization Sector

Get started by understanding the different business patterns that apply to your sector. This tutorial will guide you through the initial steps of digital transformation. ?

How to Use This Tool:

- 🌐 Select your country
- 📍 Choose Rural or Urban area
- 🏢 Pick your sector (e.g., Retail, Health, Education)

After selecting your sector, explore the Business Pattern diagram and click on any element to learn more about the specific processes involved.

**SUGGESTION:** Please review the short tutorials indicated by '?' on all the pages. They will add great value to this Advisor

Country

Turkey

PESTLE Tool

OECD Go Digital Toolkit ?

Domain/Sector Value Chain ?

Retail

Area of Service

Rural  Urban

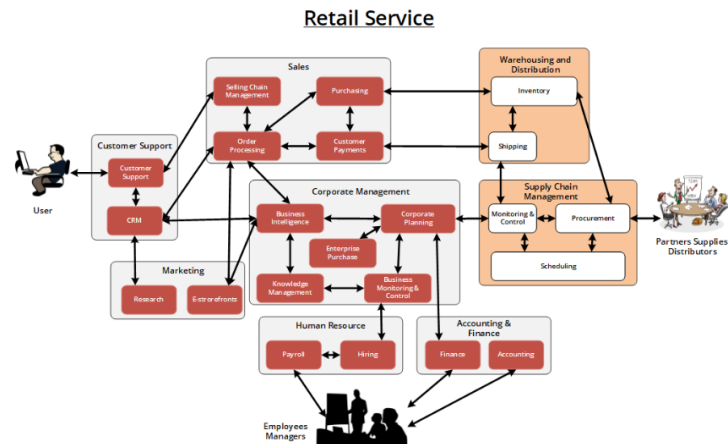
### Key Country Data

Upper Middle Income Group  
(OECD Member State)

Key SDGs (Sustainable Development Goals) Indicators

Indicator	Latest Data	Status
Ease of doing business score (0 = lowest performance to 100 = best performance)	76.79 (2019)	🟢
<a href="#">[more..]</a>		

Liner shipping connectivity index (maximum value in 61.5 (2021)



# Step 2: Digitalization Status & Target Business Functions (BFs)

- In this step, please select a current digitalization state (e.g., brick and mortar).
- The system automatically will suggest the next (target) state of automation and will also show a list of business functions that could be automated (e.g., CRM, Purchasing).
- The user specifies the main objectives (goals) of the transformation, e.g., Survival (basic services), Expanding customer base, Expanding suppliers).
- Depending on the objectives, this tool suggests business functions that should be automated to meet the transformation objectives. For example if the objective is Survival, then Customer support and Sales is selected; if Customer satisfaction then just automation of CRM; for more suppliers, automation of supply chains and warehousing, etc).
- For user convenience, the system shows common business (blue) and industry specific (green) functions.

**NOTE:** For better management control, please do not select more than 2 or 3 functions to automate in this step. Also, it is a good idea to distribute automation evenly between blue and green boxes.

## Step 2: Digitalization Status and Target Business Functions ?

In this step, a list of business functions are shown that corresponds to your subject sector and other choices in the previous step. You may choose certain objectives of automation that will recommend certain Business Functions (BFs) for automation by selecting/deselecting certain BFs. You can override the recommendation as per your choice.

**Suggestion:** To develop a better understanding, play around a bit by selecting different objectives and then observing how the list of Business Functions changes.

The Business Functions are subdivided into three categories:

- Commercial or Customer Facing Functions
- Back-Office Functions
- Industry Functions or Operations

### Digital Transformation Objectives (Pick any 3 from the following list)

- Basic Services
  - Expand Customer Base
  - Improved Supply Chain Management
  - Attract Better Employees
  - Others
- Specify other objectives

BFs (Business Functions)	BPs (Constituent Business Processes)
<input checked="" type="checkbox"/> Customer Support	<input checked="" type="checkbox"/> Customer Service <input checked="" type="checkbox"/> CRM
<input type="checkbox"/> Sales Services	<input type="checkbox"/> Selling Chain Management <input type="checkbox"/> Order Processing <input type="checkbox"/> Purchasing <input type="checkbox"/> Customer Payments
<input type="checkbox"/> Marketing	<input type="checkbox"/> Digital or e-Marketing <input type="checkbox"/> E-storefronts
<input type="checkbox"/> Corporate Management	<input type="checkbox"/> Corporate Planning <input type="checkbox"/> Knowledge Management <input type="checkbox"/> Business Intelligence <input type="checkbox"/> Business Monitoring and Control <input type="checkbox"/> Corporate Purchasing
<input type="checkbox"/> Human Resource Services	<input type="checkbox"/> Payroll <input type="checkbox"/> Human Resource Recruiting
<input type="checkbox"/> Finance and Accounting Services	<input type="checkbox"/> Finance <input type="checkbox"/> Accounting
<input type="checkbox"/> Supply Chain Management	<input type="checkbox"/> Monitoring and Control <input type="checkbox"/> Scheduling <input type="checkbox"/> Procurement
<input type="checkbox"/> Warehousing and Distribution	<input type="checkbox"/> Inventory <input type="checkbox"/> Shipping

# Step 3: For Each BF -- Current & Future use of Digital Technologies by Using 8 Dimensional Model

Each selected BF (Business Function) is automated by using the 10 Technology Dimensions. The 10 dimensions support the following objectives:

- Globalization (Boundaries Crossed): helps reaching out to customers and suppliers around the globe
- Smartness Dimension: AI & Machine learning can eliminate redundant tasks
- Web Usage-- semantic web can convert web content to “intelligent” content that accelerates transformation
- Mobile Computing is essential to support wireless business services
- Analytics is used to extract valuable insights from data through visualizations, predictions and optimizations
- Database Dimension: more data supports more insights and decisions through Analytics
- Outsourcing (cloud) Dimension: Cloud services support agile outsourcing
- Security Dimension -- Data privacy and security
- Cyber-Physical and Immersive Tech dimensions

## Step3: Current and Future status in term of enabling technologies ?

Subject Business Function: **Customer Support** (Selected BF)

A tentative holistic image of subject BF is depicted through enabling technologies. Please feel free to make changes as per your future vision. The consequences of your choices, shown in next step, will be the costs (pitfalls) and benefits (promises).

Please select current digitalization stage of subject Business Function



PS: The graphic on the left is for current and right is for future

Current Scenario	Future Vision
<b>Globalization (Boundaries Crossed)</b> Local Operations	<b>Globalization (Boundaries Crossed)</b> Initial Global Expansion
<b>Smartness Dimension</b> Manual Operations	<b>Smartness Dimension</b> Basic Automation
<b>Web Dimension</b> No Web Presence	<b>Web Dimension</b> Basic Informational Website
<b>Mobile Computing</b> No use of Wireless Services	<b>Mobile Computing</b> Basic Mobile Apps
<b>Analytics</b> Manual Data Handling	<b>Analytics</b> Descriptive Analytics
<b>Database Dimension</b> Manual Data Management	<b>Database Dimension</b> Basic Database Systems
<b>Outsourcing (cloud) Dimension</b> In-House Operations	<b>Outsourcing (cloud) Dimension</b> Basic Outsourcing
<b>Security Dimension</b> Basic Security Practices	<b>Security Dimension</b> Structured Cybersecurity
<b>Cyber-Physical Dimension</b> Manual Operations	<b>Cyber-Physical Dimension</b> Basic Automated Physical Processes
<b>Immersive Technologies</b> No Immersive Technology Use	<b>Immersive Technologies</b> Digital Content and 2D Media

# Step4: For Each BF -- Benefits and Risks of Automation

There are benefits and risks for automating each selected BF (Business Function). Here are some general observations:

Promises & Benefits (Low, Medium, High)

- Increase in Efficiency and Productivity
- Better decisions based on actual data
- Reduction in Production Lead Times
- Reduced Down-time
- Clarity in identifying production challenges

Risks and Costs

- Transformation Costs
- Privacy concerns distrust about technology
- Shortage of Trained Work force
- Unclear economic benefits
- Oversight and complexity of diagnosing problems

Note: This is an active area of work because benefits and risks can be general or specific to each BF . We have done general CB analysis but need more BF specific CB analysis. .

### Digital Transformation Game

#### Step4: Benefits and Risks ?

Here risks and Promises against your transformation choices are depicted. Please take a look and determine if the overall costs (pitfalls) are higher same or lower than benefits. If costs are lower then do the transformation from current to future, otherwise not.

Please click on the following link if you like to go through Cost-Benefit analysis in same detail

[Cost-Benefit Analysis Tool >](#)

#### Promises and Benefits

Increase in Efficiency and Productivity ?  
Low

Better decisions based on actual data ?  
Low

Reduction in Production Lead Times ?  
Low

Reduced Down-time ?  
Low

Clarity in identifying production challenges ?  
Medium

#### Risks and Costs

Transformation Costs ?  
Low Impact

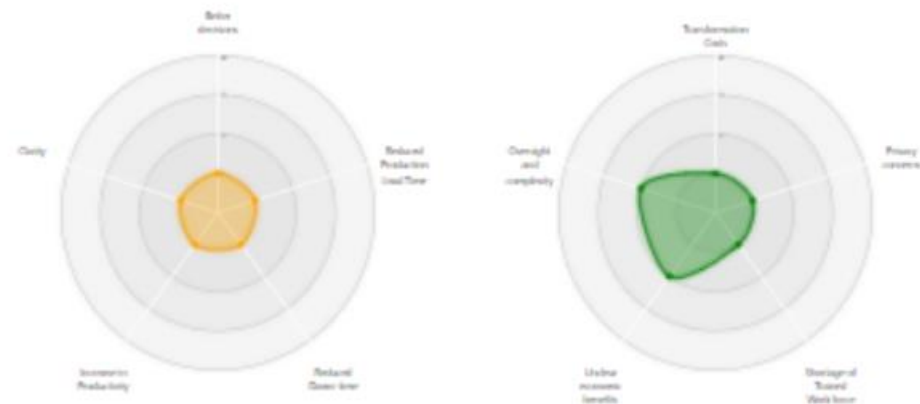
Privacy concerns distrust about technology ?  
Low Impact

Shortage of Trained Work force ?  
Low Impact

Unclear economic benefits ?  
Low Impact

Oversight and complexity of diagnosing problems ?  
Low Impact

Visual Representation of Benefits and Risks of Transformation



# Final Decision Analysis: Going from Current to Target (Desired) Status

- How can you improve the promises (i.e., increase the benefits)
- In your judgement, what are other benefits/promises
- In your judgement, what are other costs/risks/pitfalls
- Please specify what have you learned about Digital Transformation from this Learning Game that you did not know before.
- Based on what you know so far, can you make a Go/NoGo decision about this transformation.
- If 'No', what additional information would you need to make this decision.

## Final Decision Analysis: Going from Current to Target (Desired) Status

Please go through the questionnaire to help better your experience with this automated advisor. It will take a few minutes. Thanks.

To skip or submit your feedback, please press 'Next' button at the end of the page.

How can you manage the risks

How can you improve the promises (i.e., increase the benefits)

In your judgement, what are other benefits/promises (please go beyond the report and specify your own considerations)

In your judgement, what are other costs/risks/pitfalls (please go beyond the report and specify your own considerations):

Please specify what have you learned about Digital Transformation from this Learning Game that you did not know before.

Based on what you know so far, can you make a Go/NoGo decision about this transformation.

No ▼

Since you selected 'No', what additional information would you need to make this decision.

Thank you very much for your interest!.

# Quiz and Final Report

**Assessment Quiz** assures that the users have understood the concepts. Users can try the Quiz many times to improve learning.

**The Digital Transformation Report** gives a summary of the current and future target use of technologies provides synopsis of Benefits and Risks:

- Risks are presented in terms of Transformation Costs, Increased WorkLoad, Need for Trained Staff and Behind the scene complexities
- Benefits are shown in terms of Resilience to Pandemics, Reduction in Operational Costs, Broad Customer-Base, Increase in Efficiency and Productivity.

A more thorough benefits and risks reports will be produced in the future. This final report concludes the Digital Transformation game.

Business Functions and Desired Automation Levels across Technological Dimensions											
Fuctions	Processes	Mobile	Web	Globalization	Smartness	Databases	Analytics	Outsourcing/Cloud	Security	Cyber-Physical	Immersive Technologies
Customer Support Transform from: Brick and Mortar to Business with e-Advertising		Basic Mobile Apps	Basic Informational Website	Initial Global Expansion	Basic Automation	Basic Database Systems	Descriptive Analytics	Basic Outsourcing	Structured Cybersecurity	Basic Automated Physical Processes	Digital Content and 2D Media
<p><u>Benefit:</u> 24/7 Support: Automated chatbots and AI-driven support provide round-the-clock assistance.</p> <p><u>Benefit:</u> Improved Response Times: Faster resolution of customer queries through automation.</p> <p><u>Benefit:</u> Personalized Support: AI can offer tailored support based on customer history.</p> <p><u>Cost:</u> Handling Complex Issues: Automated systems may not handle complex queries well.</p> <p><u>Cost:</u> Customer Frustration: Poorly implemented AI solutions can lead to dissatisfaction.</p>											
Generic Benefits and Risks/Costs											
Benefits						Costs					
<ol style="list-style-type: none"> <li>1. Increased Efficiency: Automation reduces manual work and streamlines processes. ( low impact)</li> <li>2. Enhanced Data Insights: Advanced analytics provide actionable insights from large datasets. ( low impact)</li> <li>3. Improved Customer Experience: Personalized services and faster response times enhance satisfaction. ( low impact)</li> <li>4. Cost Savings: Optimized operations lead to reduced costs. ( low impact)</li> <li>5. Scalability: Digital solutions can easily scale to meet growing business demands. ( low impact)</li> <li>6. 24/7 Support: Automated chatbots and AI-driven support provide round-the-clock assistance. ( low impact)</li> <li>7. Improved Response Times: Faster resolution of customer queries through automation. ( low impact)</li> <li>8. Personalized Support: AI can offer tailored support based on customer history. ( low impact)</li> </ol>						<ol style="list-style-type: none"> <li>1. Data Security Risks: Increased vulnerability to cyber attacks and data breaches. ( low impact)</li> <li>2. High Initial Costs: Integration Challenges: Difficulty in merging new systems with existing infrastructure. Significant investment in technology and training. ( low impact)</li> <li>3. Over-Reliance on Technology: Dependence on digital tools can lead to disruptions if systems fail. ( low impact)</li> <li>4. Change Management Issues: Resistance to change from employees and stakeholders. ( low impact)</li> <li>5. Privacy Concerns: Handling of sensitive data must comply with regulations. ( low impact)</li> <li>6. Skill Gaps: Need for continuous training and skill development. ( low impact)</li> <li>7. Handling Complex Issues: Automated systems may not handle complex queries well. ( low impact)</li> <li>8. Customer Frustration: Poorly implemented AI solutions can lead to dissatisfaction. ( low impact)</li> </ol>					
<p><b>Additional Thoughts on How to Manage and Understand the Risks</b></p> <ul style="list-style-type: none"> <li>• Failure is a major risk (70-80 % of DXs fail). Major reason is lack of knowledge</li> <li>• As you go up in Stages, complexity increases and more risks of failures are introduced</li> <li>• Newer technologies also introduce risks</li> <li>• ERPs are large scale and complex systems that introduce more risks of failure</li> <li>• Too much automation of Business but not Industry Specific Processes and vice versa is also risky</li> </ul>											
<p><b>How can you improve the promises (i.e., reduce the risks)</b></p> <ul style="list-style-type: none"> <li>• Make sure that the key staff members have buy-in</li> <li>• Pay attention to staff training to assure successful transformations</li> <li>• Automate the BPs that have the highest payoff</li> <li>• Pay special attention to BRODE (Buy, Rent, Outsource Development, Develop Yourself) tradeoffs</li> <li>• Leverage Cloud services to increase the chances of success (SAAS is increasingly becoming a valuable choice)</li> </ul>											



# Suggested Experiments for the Digital Transformation Advisor

## *From Simple to Complex*

**Experiment1:** Select a country and sector of your choice and run through the entire game *without making any changes to the game (i.e., just use defaults).*

Main requirements:

- Transformation of core business functions from current to future stage (e.g., brick and mortar to web advertising)
- Please read the tutorials and explains carefully and score at least 80%. Then also read the final report carefully and note the lessons learned.

**Experiment2:** Select a developing country and sector of your choice and run through the entire game *by making any changes to the game as you need .*

Main requirements:

- Objective: Transformation of **industry specific functions** from current to future stage (e.g., stage2 to Stage3 )
- Please read the tutorials and explains carefully and score at least 80%. Then also read the final report carefully and note the lessons learned.

**Experiment3:** Select a developed country (e.g., OECD) and a complex sector (e.g., Healthcare, Manufacturing) and push the limits of the game *by making any changes to the game as you need .*

Main requirements:

- Objective: Transformation of **industry specific functions** from current to future stage (e.g., stage3 and Stage4)
- Please read the tutorials and explains carefully and score at least 80%. Then also read the final report carefully and note the lessons learned.

# Digital Transformation Advisor and Planner (DTAP)

*From Strategic Analysis to Implementation of Strategies*

## Crossing the Bridge

### ANALYSIS

**DIGITAL TRANSFORMATION GAME**

SUGGESTION: Please go through [Digital Transformation Tutorial](#) and watch a [video clip](#) of Digital Transformation Game before proceeding.

This tool focuses on certain [Learning Objectives](#)

[GET STARTED](#)

### BRIDGE



### IMPLEMENTATION

help Logout

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**PISA Server**

- Enterprise Modeler
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[Before proceeding to start PISA, Please take some time reviewing helpful material here. \[1\]](#)

# PISA (Planning, Integration, Security & Administration) Tool

Important: Please review the PISA Overview Document before proceeding and choose a 'Scenario' that will store all the answers

elp Logout

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# STARTING POINT: Build a Model of Your Enterprise

Suggestion: Please click on '?' for an explanation of each Step

## Enterprise Business Modeler

Step 1

Step 2

Step 3

Step 4

### STEP 1: Company Profile Basic Data ?

Please enter scenario of your organization. The information entered here will be extremely important since the recommendations and decisions made by the 'Advisors' will be based on this data.

To learn more about different types of enterprise modeling scenarios, see [Example scenario](#) as a guide to your session

For help with business issues, click here for a concise [Guide to Small and Medium sized Businesses \(SMBs\)](#)

**Scenario Import Detected:** This Scenario is continuation of *Digital Transformation Analysis*. Some of the factors are derived from the previous analysis. These include:

- Type of Industry Segment :**Retail and Wholesale**
- Site Locations:**Regional**
- Web Reliance:**Basic Websites**
- Mobile Computing and Wireless Reliance:**Wireless messaging and wireless web**

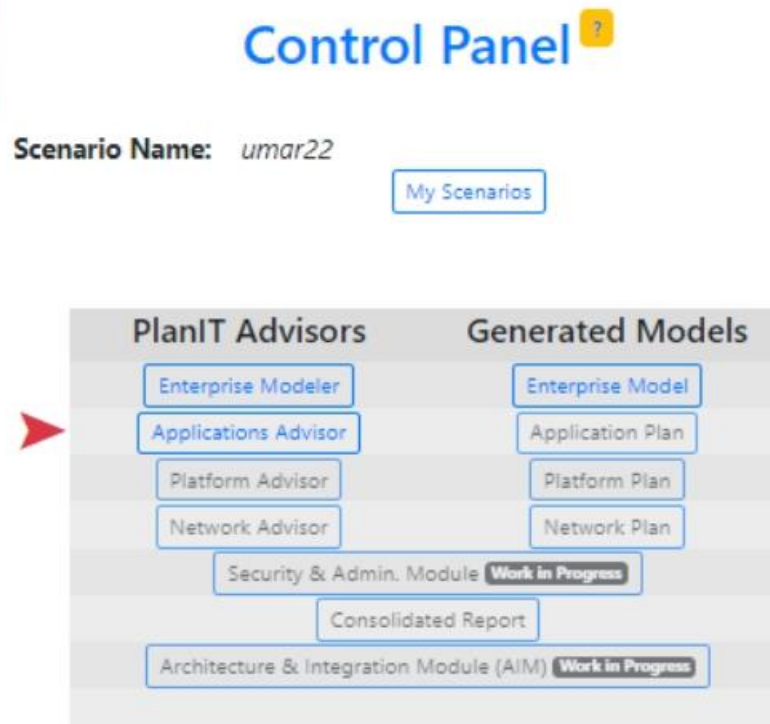
One of the aspects of the Digital Transformation Analysis was the current mode of operation and the target mode of operation. The derivation of factors is based on a **weighted maximum value for the targeted mode of operation** of the choices made for multiple Business Functions. You can change the values as you see fit. Changing any factor, may effect smart selection of relevant

# The Control Panel

It shows how all the PISA Advisors (Application Advisor, Platform Advisor and Network Advisor) will be invoked after the Enterprise Modeler and where the Generated Models will be stored

## Hints:

This is the main home page of PISA. It serves as a control panel and is shown several times as the interview progresses. **The Red Arrow** suggests a sequence in which the advisors should be invoked. **The Yellow Arrow**, if shown, indicates that AIM may be invoked at this point to investigate application integration issues and come back to the Red Arrow later. Although doable, it may get a little complicated to go back and forth between PlanIT and AIM. The suggested approach is to finish PlanIT first to develop an enterprise plan and then proceed with AIM to investigate architecture and integration issues.



## Additional Hints:

PISA consists of a set of advisors that are subdivided into the following two modules:

### PlanIT (Planning for IT) Module:

These advisors are used to build a model of an enterprise and then develop the application, platform, network and security plans of the enterprise. PlanIT is the starting point.

### AIM (Architecture and Integration Module):

These advisors are used to explore enterprise applications, develop requirements for them and build/evaluate integrated architectures

# Detailed Summary Report

This Report shows detailed results of all the PISA Advisors.

**IMPORTANT:** These results show how the Strategy Developed in DTA can be actually implemented

## Detailed Summary Report

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### Executive Summary

You have worked through a complete session of the planning process. This report gives a summary of all the results produced so far:

- **The Enterprise Model** that shows your company information (company type, company size, number of sites, what business processes are performed on what sites, what are the workgroups and where do they reside)
- **The Application Plan** that shows what business processes will be automated, what strategies (rent, buy, outsource, re-use) are used to automate the business processes, and any COTS (commercial-off-the-shelf) packages selected.
- **The Computing Platform plan** that shows the computing hardware and software needed to support the application plan.
- **The Network Plan** that shows the wireless as well as wired network to support your staff (called Intranet), your customers and your business partners and suppliers.
- **The Security Plan** needed to protect your corporate assets (databases, programs, computers, network links, network devices).

The next steps are:

- Develop an RFQ (Request for Quotation) to solicit proposals from consulting companies and service providers who will implement the plan
- Select and hire a consultant to refine and implement the plan

This report can be used in all these steps. It is already in an RFQ format and can be used by the consultants to quickly understand what you are planning to do.