

Category

Digital Transformation

Measuring Digital ROI & Value Realization Playbook

A benefits realization method that tracks digital transformation value from business case through delivery to actual, measured impact.

- Practitioner
- Intermediate
- Template Included
- Workshop Ready

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- 8 minute(s)

Overview

A structured approach to defining, tracking, and proving digital transformation ROI, closing the gap between projected business case value and what actually shows up in the P&L.

How is this different from standard project ROI tracking in a business case?

Most business cases estimate ROI once, at approval, and never revisit it after go-live. This playbook adds the tracking discipline that continues past delivery — baselines captured before the work starts, quarterly measurement against those baselines, and a formal reconciliation 12–18 months later comparing promised value to what was actually realized.

What if an initiative has already gone live without a captured baseline?

Reconstruct the best available baseline from historical data (prior-period reports, system logs) and clearly flag it as a retrospective estimate rather than a pre-captured baseline. It's weaker evidence than a true baseline, but still far better than no value tracking at all going forward.

Who should be the named business owner for a benefit, if not the project manager?

The leader who controls the process or budget line where the benefit shows up — for example, the operations director who would need to actually reduce headcount or cost for a claimed savings to materialize. If no one in the business is willing to own that accountability, that's a signal the benefit may not be realistic.

How do we measure soft benefits like productivity or employee experience credibly?

Use a consistent, repeatable proxy metric (time-on-task studies, survey instruments with a fixed methodology, adoption/usage data) measured the same way at baseline and follow-up, and report it separately from hard-dollar benefits rather than converting it into an estimated dollar figure that invites scrutiny.

What should happen if quarterly tracking shows a benefit isn't materializing?

Treat it as an early warning, not a final verdict — investigate whether the gap is a measurement issue, an adoption issue, or a genuinely flawed original assumption, and escalate to the initiative's business owner for a corrective action plan well before the 12-18 month reconciliation makes it official.

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