

Assess Your Organization's Transformation Quotient

Assess your organization's ability to innovate and transform what truly matters.

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Analyst perspective

From digital foundation to value realization, a transformation quotient assessment (TQA) is a strategic assessment of your organization's ability to innovate and transform.



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What is your TQ?

When a global industrial manufacturer headquartered in the US launched its multiyear transformation, executives believed new technologies would spark innovation. Two years in, digital projects were everywhere – yet demonstrable value was little and rare. What went wrong? The organization had measured digital maturity but never its transformation quotient – its ability to turn digital investments into strategic value.

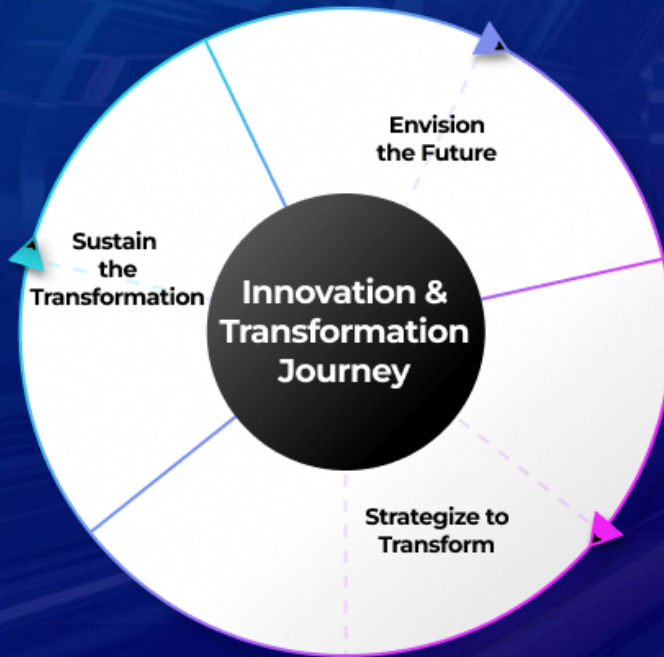
The second step of your **innovation and transformation journey**, the TQA, is designed to bridge this gap. Unlike conventional digital maturity models that assess an organization only on technology foundations, a TQA bridges vision with value realization. It evaluates how functional digitalization across the industry value chain is taking shape and if strategic value – growth, efficiency, resilience, or human experience – is truly being realized.

For organizations navigating complex change, a TQA acts as both mirror and compass. It reflects the true state of transformation and guides priorities toward the areas of greatest strategic return.

In an era where digital maturity alone no longer guarantees progress, understanding your TQ is the difference between “doing digital” and becoming transformed.

What is an innovation & transformation journey?

A continuous cycle of envisioning the future, strategizing to transform, and sustaining the transformation to create digital value.



Start by visualizing the future of your industry.

Then, assess your organization's TQ – the state of innovation and transformation.

Then, zero in on business objectives and customize your business capability map to draft a clear innovation & transformation strategy.

This results in the highest value opportunities stitched in an innovation & transformation roadmap.

Finally, fortify with the right management and governance practices to make this journey sustainable.

Innovation & Transformation Journey

Not an activity with a start and end but a continuous cycle of digital value creation.

More than **70%** of digital transformations have failed to realize their objectives, mainly because they focused on the first part – “digital” in its narrowest sense (i.e. technology) – and not the second part: transformation.

Assess and Elevate Your Transformation Quotient (TQ)

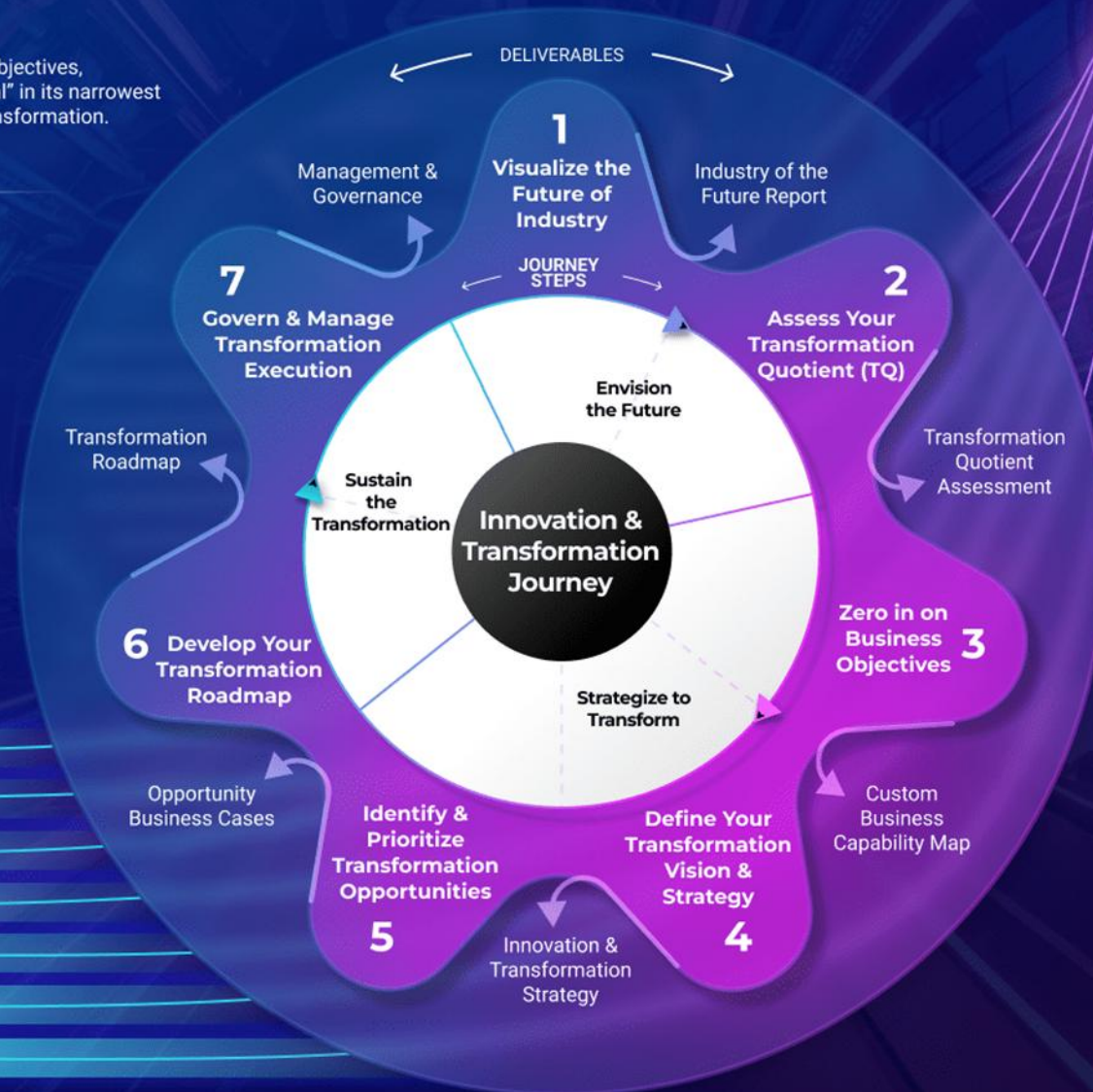
covering 38 subdimensions across 10 dimensions:

- | | |
|---------------------------------|-------------------------------------|
| A. Strategy & Governance | F. Operational Agility & Innovation |
| B. Customer & Partner Ecosystem | G. People & Culture |
| C. Technology Foundation | H. Core Function Digitalization |
| D. Data Analytics | I. Enabling Function Digitalization |
| E. Artificial Intelligence | J. Value Realization |

Transformation Target

Realize the value of transformation by focusing on what drives differentiation.

- Tech Infrastructure
- ◆ Employee Experience
- Operating Model
- Supplier/Partner Relationship
- ▲ Products/Services
- ▲ Business Model
- ◆ Customer Experience



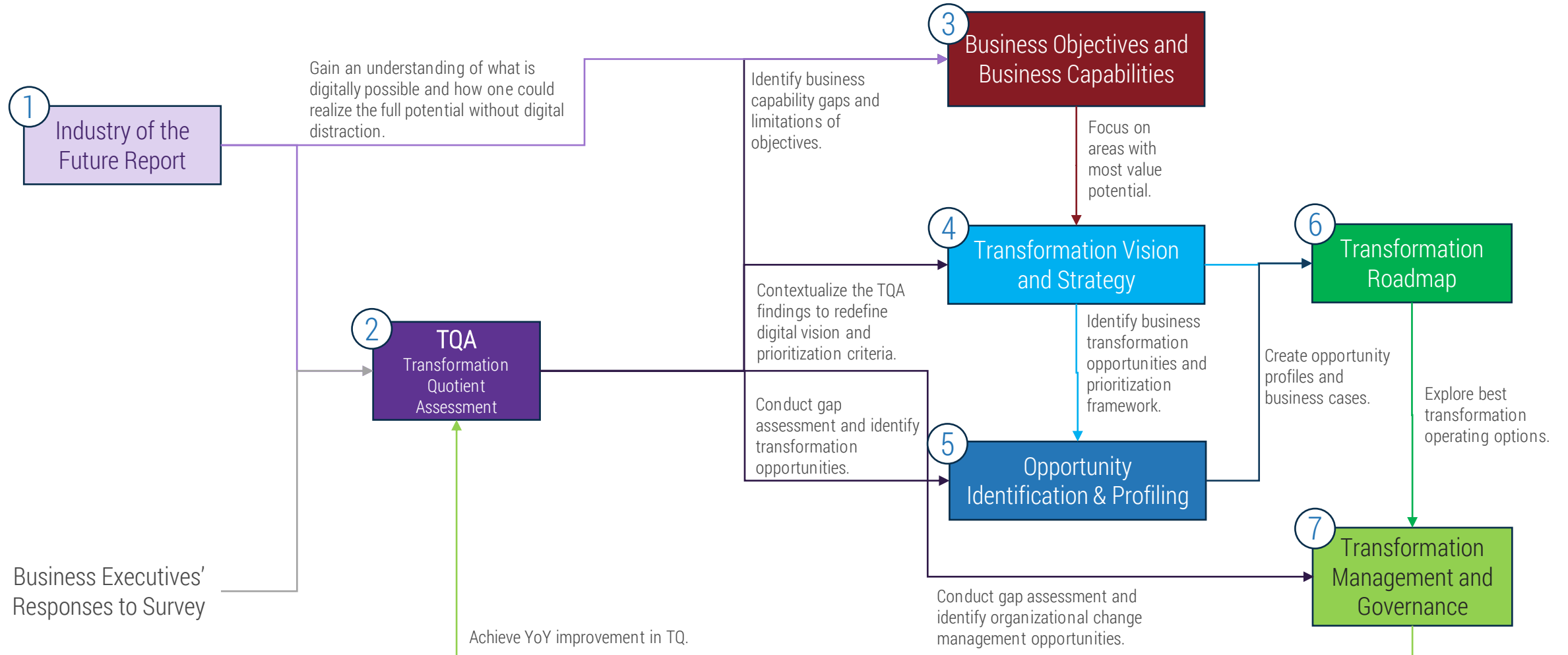
Outcomes of Innovation & Transformation

- Organizational Resilience
- Operational Excellence
- ▲ Organizational Growth
- ◆ Beneficiary Experiences

Key Insight

Envision the future of your converging industry beyond today's ecosystem – then transform customer value and raise entry barriers through differentiating assets like data, delivery channels, and personalized experiences.

TQA insights feed into most steps of the innovation & transformation journey



Purpose of this document

The purpose of this document is to:

1. Provide an overview of the TQA, how it works, and the insights it will provide your organization.
2. Outline the key dimensions investigated as part of the TQA **survey**.
3. Provide an overview of the TQA **report and insights**.

This document and the TQA *do not provide*:

- A comprehensive overview of all components required to drive innovation & transformation.
- A comprehensive guide to increase TQ across survey pillars.
- An assessment to understand IT infrastructure maturity.

These items should be taken on in subsequent steps of the journey, especially within the Transformation Vision and Strategy step.

Outcome

Establish or update an organization's baseline TQ.

Deliverables

1

TQA Results & Report

Key deliverable

Supporting context:



TQA Survey Questions

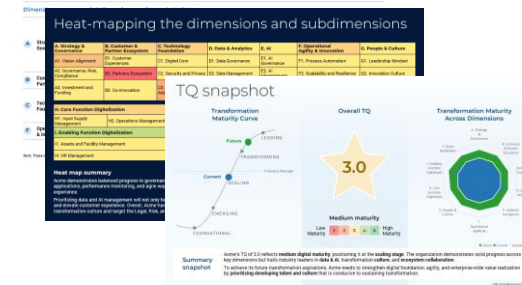
This PDF file has a preview of all the questions used in the survey to assess an organization's TQ.



TQA Frequently Asked Questions

This file preempts most FAQs related to the *TQA Results & Report*, answering them before you even engage with an Info-tech analyst.

Priority action to elevate TQ



TQA Results & Report

This is the final deliverable of TQA experience. It summarizes and visualizes critical insights based on the survey data.

The TQA provides three levels of insights: 1, Executive Summary; 2, Dimension Summary; and 3, Detailed Report by Questions.

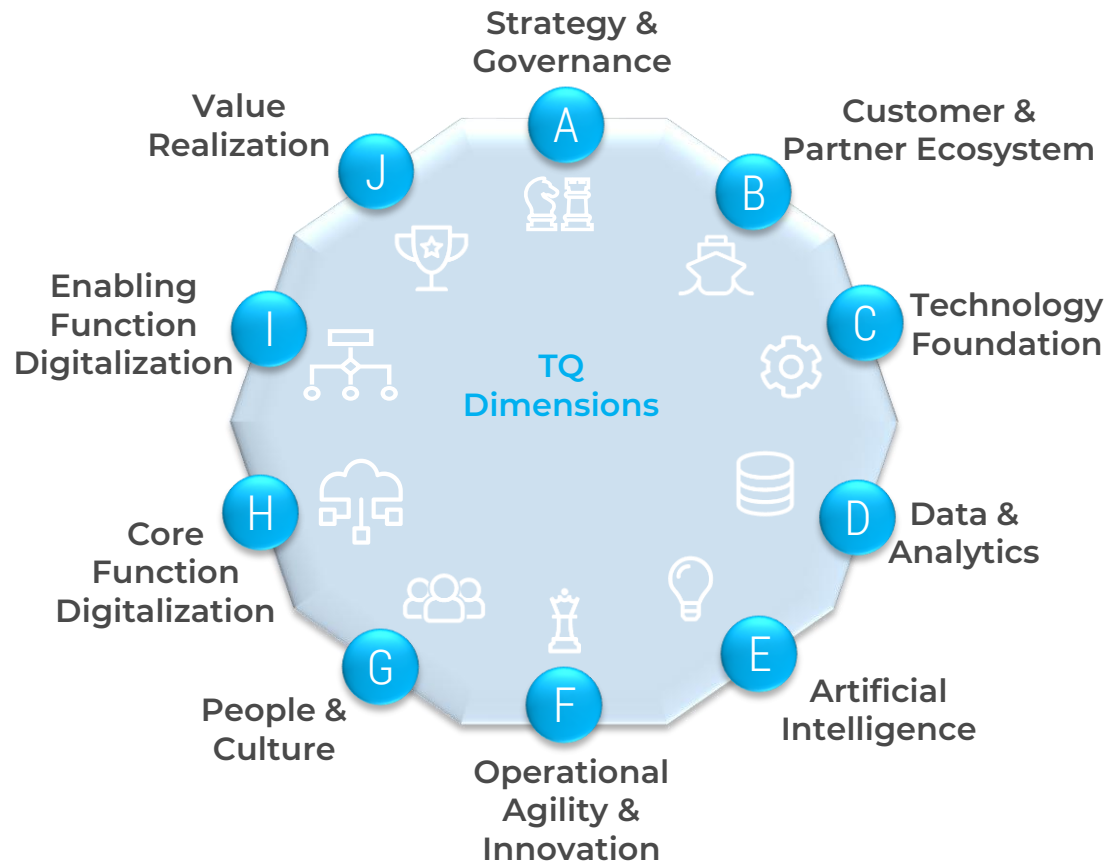
Overall, the report helps you visualize the state of innovation and transformation in your organization and articulates the most important actions you can take to elevate your organizational TQ.

What is the TQA?

The TQA is a high-level diagnostic survey that provides an internal perspective on current digital adoption and delivery infrastructure. As data is collected across many organizations of similar profiles, external benchmarking will become available.

Info-Tech's TQA ...

- Is an enterprise-level assessment survey.
- Is an internal review of the organization.
- Covers ten key dimensions integral to a transforming organization.
- Delivers valuable insights across all ten dimensions in a robust report.



The results enable leaders to ...

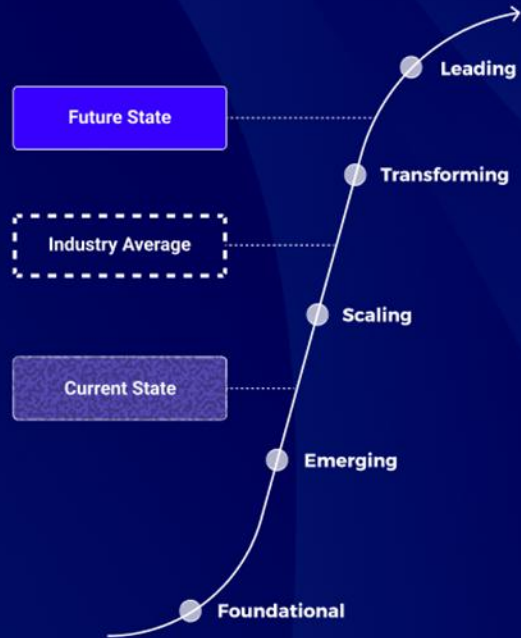
- Understand the current TQ across ten dimensions.
- Understand opportunities and help define the transformation vision and roadmap.
- Identify capabilities needed to successfully execute against the transformation vision.
- Understand the magnitude of the transformation effort.

Transformation Quotient Assessment (TQA)

Measure your organization's ability to innovate and transform what truly matters.

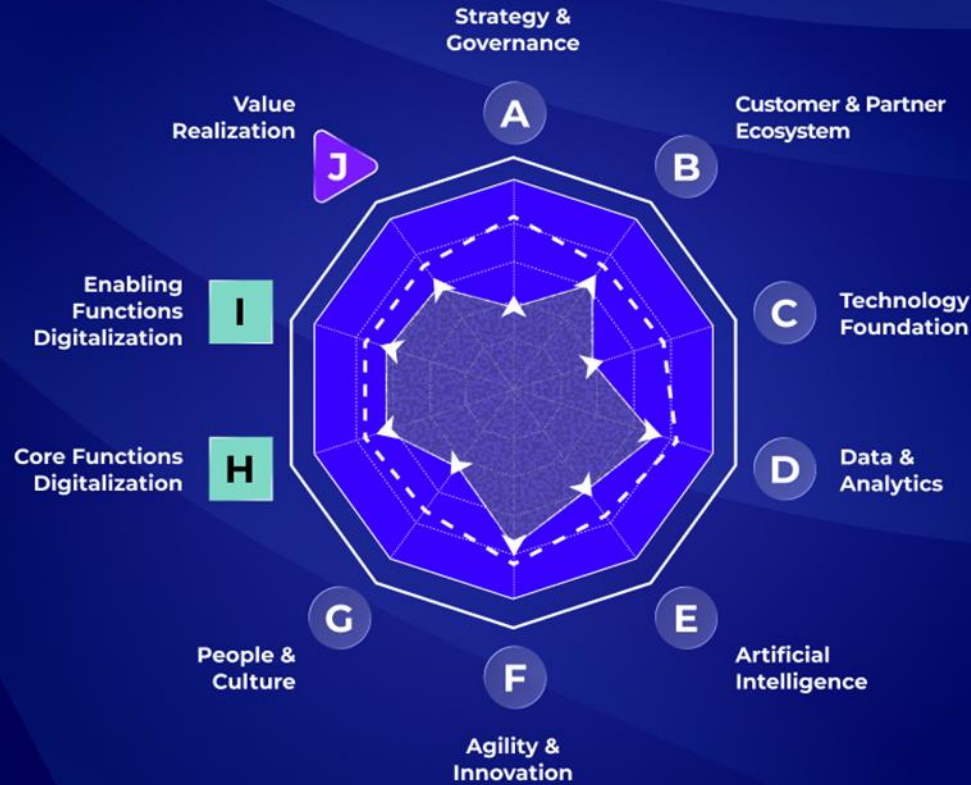
THE TQA TAKES YOU FROM VISION TO REALIZATION

It identifies gaps in your transformation journey from vision to value realization. It goes beyond traditional maturity models by evaluating functional digitalization across the value chain, revealing where the transformation can drive true strategic outcomes.



Transformation Maturity Curve

Visualizing the current and future aspirations in the context of Industry average helps chart out a sustainable path for transformation.



Transformation Quotient Across Ten Dimensions

Knowing where you're relatively strong – and where you're not – illuminates the most critical transformation opportunities.

A Strategy & Governance

- Vision Alignment
- Investment and Funding
- Governance, Risk, and Compliance

B Customer & Partner Ecosystem

- Customer Experiences
- Partners Ecosystem
- Co-Innovation

C Technology Foundation

- Digital Core
- Emerging Tech Adoption
- Security and Privacy

D Data & Analytics

- Data Governance
- Data Management
- Data-Driven Decision

E Artificial Intelligence

- AI Governance
- AI Management
- AI Applications

F Agility & Innovation

- Processes Automation
- Agility and Flexibility
- Scalability and Resilience
- Performance Monitoring

G People & Culture

- Digital Talent
- Leadership Mindset
- Innovation Culture
- Agile Ways of Working

H Core Functions Digitalization

- Input Supply Management
- Operations Management
- Product/Service Delivery
- Marketing and Sales
- Customer Service

I Enabling Functions Digitalization








- Assets and Facility Management
- Finance and Accounting
- Legal, Risk, and Compliance
- HR Management
- Technology
- Vendor and Procurement



J Value Realization


- Organizational Growth
- Operational Excellence
- Organizational Resilience
- Beneficiary Experiences

The TQA framework

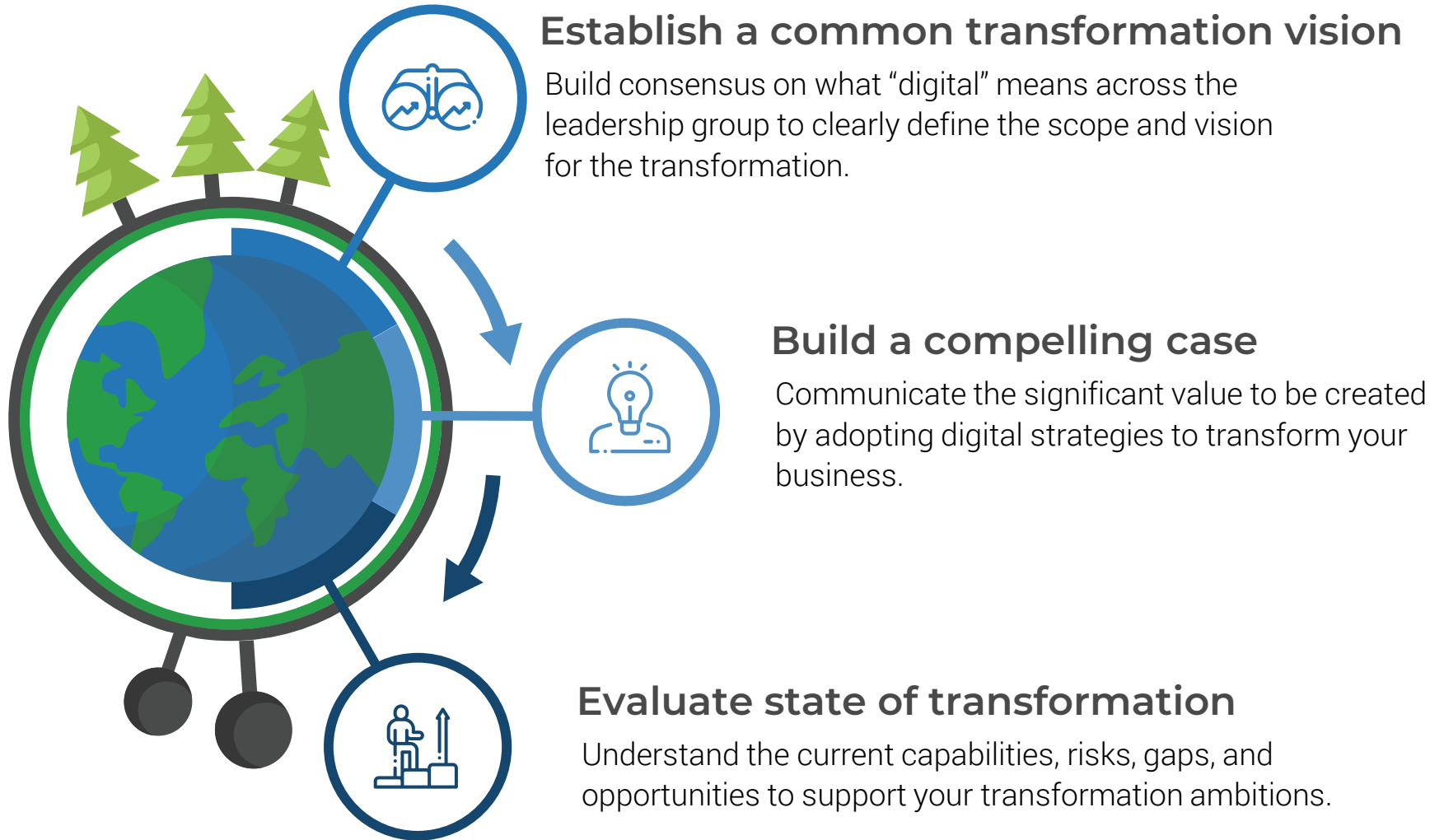
A TQA is a survey that provides a multidimensional perspective on the current state of transformation and perceived value. It evaluates innovation and transformational maturity across ten dimensions. Each dimension consists of a short set of questions answered by IT and business leaders and is scored on a scale from 1 to 5.

<div>A</div> <div></div> <div>Strategy & Governance</div>	<div>B</div> <div></div> <div>Customer & Partner Ecosystem</div>	<div>C</div> <div></div> <div>Technology Foundation</div>	<div>D</div> <div></div> <div>Data & Analytics</div>	<div>E</div> <div></div> <div>Artificial Intelligence</div>	<div>F</div> <div></div> <div>Operational Agility & Innovation</div>	<div>G</div> <div></div> <div>People & Culture</div>
Vision Alignment	Customer Experiences	Digital Core	Data Governance	AI Governance	Processes	Digital Talent
Governance, Risk, Compliance	Partners Ecosystem	Emerging Technology Adoption	Data Management	AI Management	Agility & Flexibility	Leadership Mindset
Investment and Funding	Co-Innovation	Security and Privacy	Data-Driven Decisions	AI Applications	Scalability & Resilience	Innovation Culture
					Performance Monitoring	Agile Ways of Working

<div>H</div> <div></div> <div>Core Function Digitalization</div>					<div>J</div> <div></div> <div>Value Realization</div> <div>Organizational Growth</div> <div>Operational Excellence</div> <div>Organizational Resilience</div> <div>User Experience</div>
Input Supply Management	Operations Management	Product/Service Delivery Management	Marketing & Sales	Customer Service	

<div>I</div> <div></div> <div>Enabling Function Digitalization</div>		
Assets and Facility Management	Finance and Accounting	Legal, Risk, and Compliance
HR Management	Technology	Vendor and Procurement

Why undertake a TQA?



Innovation and transformations are complex and often fail to deliver significant value. Info-Tech’s TQA can uncover addressable opportunities for improvement that will strengthen your transformation efforts.

An organization’s TQ is a critical determinant of its ability to create value through digital and is a strong predictor of success in innovation & transformation initiatives.

A TQA can provide value at any point in organizational transformation

During transformation

The TQA can be conducted periodically throughout innovation and transformation to ensure the TQ is improving.

Before transformation

The TQA measures an organization's readiness for innovation and transformation. When planning for transformation, this knowledge can help an organization take advantage of its strengths and shore up its weaknesses to increase the probability of success.

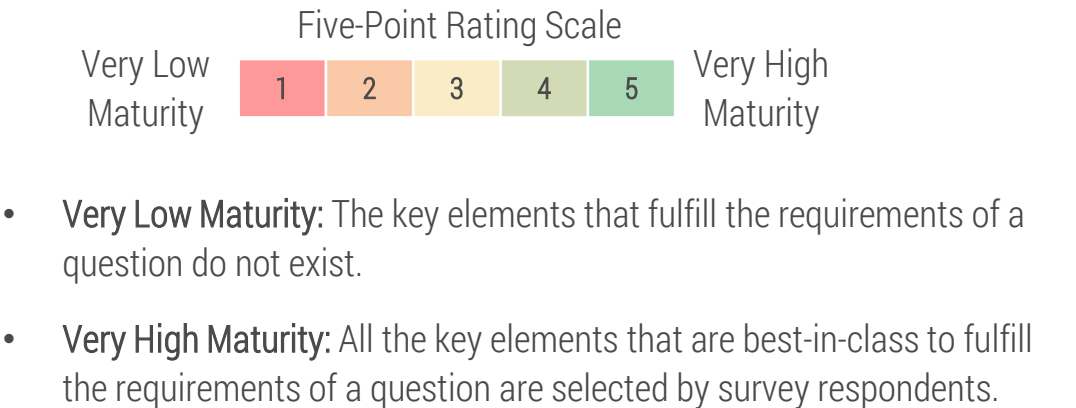
After transformation

The posttransformation TQA is used to ensure the TQ achieved during the transformation is sustained. It can also inform any future innovation & transformation initiative planning, progress, and sustainability.

Methodology: The TQA uses a five-point rating scale to assess an organization's TQ

A five-point rating scale is used to score each question

The five-point rating scale ranges from very low maturity (1) to very high maturity (5) and is used to summarize the results for each question across ten dimensions.



Questions and answers are written so that if key elements that fulfill the requirements of a question are not selected by all respondents, there is a clear and objective correlated insight and recommendation for improvement.



The survey consists of multiple-choice questions with the same scoring methodology

Type of Question	Description & High-Level Scoring Methodology
Multiple-choice/Select One	Respondents select most appropriate/applicable answer to each question. Each subsequent answer option indicates higher-level maturity over the previous answer option for that question. Each of the answer options is assigned a score from 1 to 5.
Free Response	No scores provided for free-response questions. These questions provide insights into employee-identified improvement opportunities.

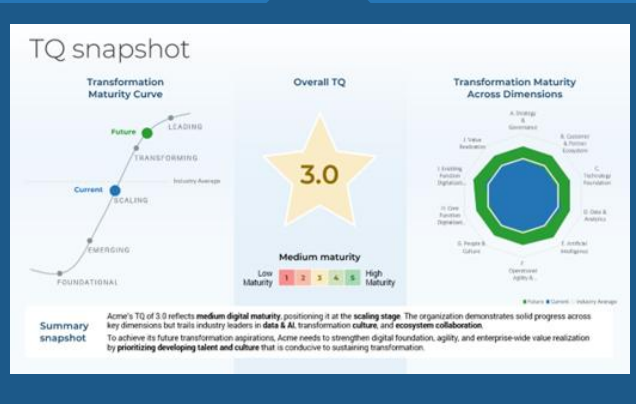
Scores are determined across multiple levels:

- Question scores:** Respondent scores are averaged for each question.
- Subdimension scores:** Question scores are averaged for each subdimension.
- Dimension scores:** Subdimension scores are averaged, weighted based on the number of questions in each subdimension.
- Overall score:** Dimension scores are averaged, weighted based on the number of questions in each dimension.

The TQA provides three levels of insights

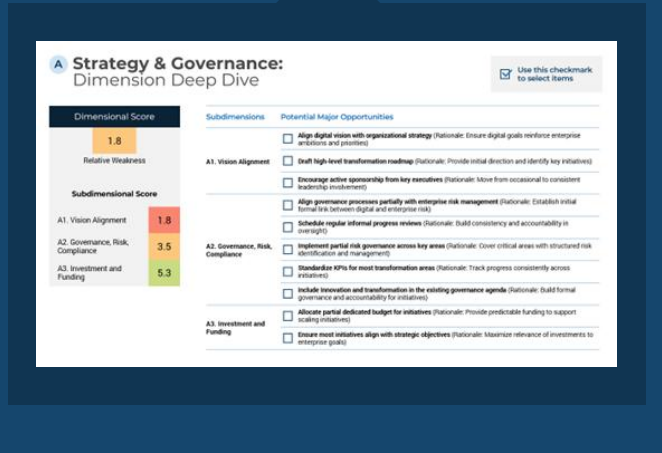
1. Executive Summary

The executive summary provides a visual representation of your dimension scores and an analysis of the state of innovation and transformation in your organization.



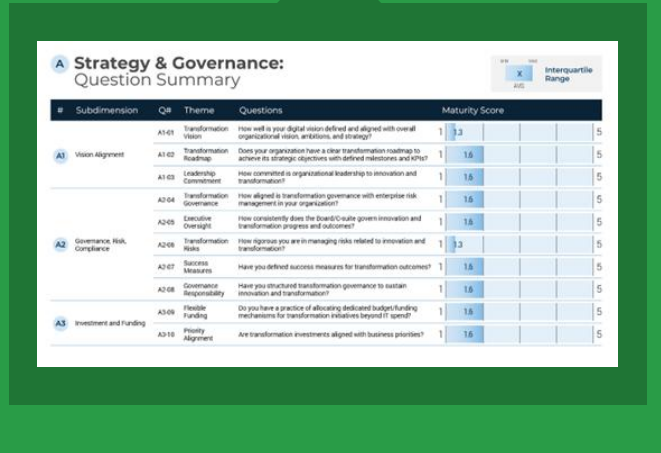
2. Dimension Summary

The dimension summary provides an analysis of the results of each dimension and subdimension and the major opportunities in each theme.



3. Detailed Report by Questions

This section of the report shows how respondents answered each question and provides detailed insights and opportunities derived from those responses.



How to get started

How to run the survey

1. Tell your Info-Tech account representative that you would like to run the survey.
2. Info-Tech will set up a 30-minute meeting to better understand your context, provide an overview of the survey, and discuss next steps (e.g. people, business units, and functions involved in the survey).
3. Info-Tech will stand up a specific survey instance for your organization and provide a link for review prior to release.
4. Info-Tech will set up a 30-minute meeting to answer questions and ensure the survey is ready to be released to participants.



What is needed to run the survey

1. **Provide business unit/function nomenclature:** The names of the business units/functions that will be involved in answering the survey are used to aggregate results and insights at the business unit/function level.
2. **Determine survey release option:**
 - a) **Single survey link:** Info-Tech will send a survey link that can then be shared with any employee identified as a survey respondent. Responsibilities of following up with survey respondents fall on the leader running the survey.
 - b) **Unique survey links:** Your organization will provide a list of survey respondents and email addresses. Info-Tech will send the survey to each employee and follow up as needed until surveys are completed.

Analyst/advisory support can provide an outside perspective on your current state and associated opportunities that can be linked to the internal perspective driven by the survey.

Interpret Functional Digitalization subdimensions in the context of your industry

This section helps you understand the subdimensions of Core Functions Digitalization and Enabling Functions Digitalization (together referred to as “functional digitalization”) as they are relevant in your industry. It covers following industries.

1. Construction
2. Public Sector
 - Government – Federal
 - Government – Local & Municipalities
 - Government – Canadian
 - Government – State
3. Higher Education
4. K-12 Education
5. Financial Services
6. Insurance – P&C
7. Insurance – Life & Healthcare Payer
8. Healthcare Provider
9. Professional Services
 - Professional Associations & Not-for-Profits
 - Professional & Technology Services
10. Manufacturing
 - Durable Goods
 - Non-Durable Goods
11. Retail
12. Casinos, Gambling & Lottery
13. Oil & Gas Operations
14. Hotels, Resorts & Hospitality
15. Sports Entertainment
16. Natural Resources and Mining
17. Transportation & Logistics
18. Utilities

Functional Digitalization subdimensions for Construction

Value Chain Function	Construction Industry Interpretation
Input Supply Management	Procurement and logistics of building materials, heavy equipment, tools, construction data, permits, and subcontractor services
Operations	Core construction activities including project design, engineering, site preparation, building, inspection, and onsite safety management
Product/Service Delivery	Handover of completed projects, commissioning, warranty management, postconstruction services, and client acceptance documentation
Marketing and Sales	Bid management, tendering, client acquisition, proposal development, partnership building, and brand promotion in target markets
Customer Service	Client relationship management, issue resolution, maintenance support, renovation services, and performance reporting after project delivery
Infrastructure and Facility Management	Management of equipment fleets, construction sites, warehouses, and physical assets for project execution and worker housing
Finance and Accounting	Project-based accounting, cost estimation, cash-flow tracking, contract billing, and profitability analysis
Legal, Risk, and Compliance	Contract management, safety regulations, zoning laws, environmental and labor compliance, and liability/risk management
Human Resource Management	Workforce planning, recruitment of skilled trades and engineers, training, certification, and onsite workforce safety management
Technology Development	Use of BIM, drones, IoT, AI-driven project planning, 3D printing, and digital twins for construction efficiency and quality
Procurement	Sourcing of materials, subcontractors, services, machinery, and technology systems to support ongoing and future projects

Note: These interpretations were generated and edited Microsoft Copilot based on Michael Porter’s value chain framework (2008).

Functional Digitalization subdimensions for Public Sector

Value Chain Function	Public Sector Agency Interpretation
Input Supply Management	Management of funding allocations, policy inputs, citizen data, infrastructure resources, interagency collaborations, and human capital to enable service delivery
Operations	Core administrative and service delivery processes – policy implementation, program management, regulation enforcement, benefit disbursement, permit issuance, and outcome monitoring
Product/Service Delivery	Delivery of public services and benefits to citizens or businesses – issuing IDs, grants, licenses, or social support and enabling access through physical and digital channels
Marketing and Sales	Public awareness and engagement – citizen outreach, community engagement, program promotion, stakeholder partnerships, and reputation management
Customer Service	Citizen interaction and grievance redressal – contact centers, service desks, feedback management, case resolution, and continuous improvement of citizen experience
Infrastructure and Facility Management	Management of public offices, field facilities, and digital infrastructure and ensuring accessibility, security, and sustainability of assets
Finance and Accounting	Budget planning, fund allocation, public expenditure management, grant and subsidy administration, and audit and reporting compliance
Legal, Risk, and Compliance	Policy and regulatory compliance, audit readiness, data governance, risk management, transparency, and adherence to statutory mandates
Human Resource Management	Workforce planning, recruitment, training, performance management, and capacity-building for civil servants and contract staff
Technology Development	Implementation of e-government platforms, data systems, AI and analytics, cybersecurity, and digital innovation for public service modernization
Procurement	Acquisition of goods, services, IT systems, and public works through transparent and compliant procurement frameworks and vendor management

Note: These interpretations were generated and edited Microsoft Copilot based on Michael Porter's value chain framework (2008).

Functional Digitalization subdimensions for Higher Education

Value Chain Function	Higher Education Interpretation
Input Supply Management	Management of academic resources, research funding, library materials, lab equipment, IT systems, and faculty expertise
Operations	Core processes – teaching, research, curriculum development, lab work, student services, and program administration
Product/Service Delivery	Delivery of courses, research outputs, certifications, degrees, and student support services
Marketing and Sales	Student recruitment, outreach, partnerships, alumni engagement, program promotion, and branding
Customer Service	Student advising, counseling, academic support, grievance handling, and career services
Infrastructure and Facility Management	Campus facilities, lecture halls, labs, residence halls, IT infrastructure, and research centers
Finance and Accounting	Tuition management, grant administration, endowment management, budgeting, and financial reporting
Legal, Risk, and Compliance	Accreditation compliance, research ethics, safety regulations, data privacy, and intellectual property management
Human Resource Management	Faculty recruitment, development, performance management, tenure processes, and staff administration
Technology Development	Learning management systems, research computing, digital libraries, cybersecurity, and campus IT innovation
Procurement	Sourcing lab equipment, IT systems, research materials, campus services, and vendor management

Functional Digitalization subdimensions for K-12 Education

Value Chain Function	K-12 Education Interpretation
Input Supply Management	Management of teaching materials, curriculum resources, technology tools, student data, and classroom supplies
Operations	Core educational processes – teaching, learning, student assessment, classroom management, extracurricular activities, and program delivery
Product/Service Delivery	Delivery of instruction, learning materials, assessment results, student support, and extracurricular programs to learners
Marketing and Sales	Student enrollment campaigns, community outreach, parent engagement, school reputation management, and program promotion
Customer Service	Parent and student support, feedback handling, counseling, grievance resolution, and academic guidance
Infrastructure and Facility Management	Maintenance of classrooms, labs, playgrounds, libraries, IT infrastructure, and school facilities
Finance and Accounting	Budget allocation, tuition management, grant and funding administration, financial reporting, and cost control
Legal, Risk, and Compliance	Adherence to education regulations, student safety, data privacy, labor laws, and accreditation requirements
Human Resource Management	Recruitment, training, certification, performance evaluation, and development of teachers, administrative staff, and support personnel
Technology Development	Adoption of digital learning platforms, classroom technology, student information systems, and cybersecurity
Procurement	Sourcing of educational materials, IT tools, furniture, lab equipment, and vendor services

Functional Digitalization subdimensions for Financial Services

Value Chain Function	Financial Services Interpretation
Input Supply Management	Acquisition and management of financial capital, customer data, market insights, regulatory inputs, technology infrastructure, and skilled financial professionals to support operations
Operations	Core banking and financial processes – account management, transaction processing, loan origination, underwriting, payments, investment management, and risk assessment
Product/Service Delivery	Delivery of financial products and services – deposits, loans, insurance policies, investment products, wealth management, and advisory – through branch, digital, and partner channels
Marketing and Sales	Customer acquisition, segmentation, campaign management, relationship marketing, product bundling, cross-selling, and omnichannel experience management
Customer Service	Handling customer queries, complaints, claims, and service requests across channels – call centers, digital assistants, and in-branch support – and enabling personalized financial guidance
Infrastructure and Facility Management	Management of branches, ATMs, data centers, and digital platforms and ensuring business continuity, security, and accessibility
Finance and Accounting	Financial control, treasury management, profitability analysis, regulatory reporting, asset-liability management, and internal audit
Legal, Risk, and Compliance	Governance, risk, and compliance (GRC) management, anti-money laundering (AML), fraud prevention, data privacy, and adherence to financial regulations
Human Resource Management	Workforce planning, recruitment, licensing, training, and retention of financial advisors, underwriters, and customer service teams, promoting performance and ethical culture
Technology Development	Development of core banking systems, digital banking apps, AI/analytics solutions, cybersecurity, RegTech, and fintech collaborations for innovation and automation
Procurement	Sourcing of IT systems, data services, consulting, facilities, and outsourcing vendors under strict compliance and third-party risk management guidelines

Functional Digitalization subdimensions for P&C Insurance

Value Chain Function	P&C Insurance Interpretation
Input Supply Management	Acquisition and management of underwriting data, risk models, actuarial inputs, reinsurance capacity, and regulatory data sources
Operations	Core insurance processes – underwriting, policy issuance, claims processing, risk assessment, and premium calculation
Product/Service Delivery	Delivery of insurance products, endorsements, renewals, claims settlements, and customer communications across digital and physical channels.
Marketing and Sales	Market segmentation, agent/broker management, product bundling, digital marketing, customer acquisition, and cross-selling initiatives
Customer Service	Policy servicing, claims support, grievance handling, policyholder education, and retention management via call centers or digital platforms
Infrastructure and Facility Management	Management of branch offices, data centers, business continuity sites, and workplace infrastructure for agents and staff
Finance and Accounting	Premium accounting, claims reserves, investment portfolio management, regulatory reporting, and financial performance analysis
Legal, Risk, and Compliance	Compliance with insurance regulations, contract management, fraud prevention, litigation, data privacy, and enterprise risk management
Human Resource Management	Talent acquisition, training for underwriters and claims adjusters, performance management, and development of actuarial and data science skills
Technology Development	Implementation of core insurance platforms, AI-driven underwriting, predictive analytics, fraud detection, and customer experience technologies
Procurement	Sourcing of technology solutions, consulting services, vendor partnerships, and outsourced claims or administrative services

Note: These interpretations were generated and edited Microsoft Copilot based on Michael Porter’s value chain framework (2008).

Functional Digitalization subdimensions for Life & Healthcare Payer Insurance

Value Chain Function	Life & Healthcare Payer Insurance Interpretation
Input Supply Management	Collection and management of actuarial data, health statistics, provider network information, and reinsurance capacity to support product design and pricing
Operations	Core insurance operations – member enrollment, premium processing, claims adjudication, use management, care coordination, and policy administration
Product/Service Delivery	Delivery of health and life insurance products, wellness programs, benefits communication, claims settlements, and reimbursement services
Marketing and Sales	Member acquisition through brokers, agents, or digital channels, employer outreach, product promotion, and partnership marketing with providers
Customer Service	Member support through call centers, portals, and mobile apps, claims inquiries, appeals, grievances, and benefits education
Infrastructure and Facility Management	Management of branch offices, service centers, IT infrastructure, and data centers supporting policy and claims operations
Finance and Accounting	Premium accounting, claims reserves, risk-based capital management, provider payments, investment income tracking, and regulatory financial reporting.
Legal, Risk, and Compliance	Compliance with health and insurance regulations (HIPAA, ACA, etc.), fraud prevention, policy governance, audit, and risk management
Human Resource Management	Workforce planning, credentialing, training for claims and provider relations staff, performance management, and employee wellbeing programs.
Technology Development	Deployment of core payer systems, data analytics for risk stratification, AI for claims automation, interoperability, and member experience platforms
Procurement	Sourcing of healthcare services, IT systems, third-party administrators, and vendor-managed services for claims, wellness, or care management

Functional Digitalization subdimensions – Healthcare Provider

Value Chain Function	Healthcare Provider Interpretation
Input Supply Management	Intake and management of resources – medical supplies, equipment, patient data, patient referrals, clinical staff scheduling, funding for care delivery, and patient triage
Operations	Core clinical and medical processes – diagnosis and imaging, treatment, surgeries, inpatient and outpatient care, patient monitoring, patient transportation, emergency response, and wellness programs
Product/Service Delivery	Discharge planning, referrals, prescriptions, test results, home-care coordination, and follow-up instructions for patients
Marketing and Sales	Community outreach, patient acquisition, brand building, partnerships, health awareness campaigns, payer/provider relationship management, and communication management
Customer Service	Ongoing patient support – rehabilitation, chronic disease management, telemedicine follow-up, patient education, and grievance handling
Infra and Facility Management	Hospital facility operations
Finance	Revenue cycle management
Legal, Risk, and Compliance	Licensing management, medical affairs, and compliance and accreditation
Human Resource Management	Recruitment, credentialing, training, retention, and performance management of doctors, nurses, and healthcare staff
Technology Development	Investment in medical technology, EHRs, telehealth, AI/analytics, medical research, treatment innovation, cybersecurity, communication tech
Procurement	Acquisition of drugs, medical equipment, IT systems, facilities, and external clinical services/vendors

Note: These interpretations were generated and edited Microsoft Copilot based on Michael Porter's value chain framework (2008).

Functional Digitalization subdimensions for Professional Services

Value Chain Function	Professional Services Interpretation
Input Supply Management	Acquisition and management of intellectual capital, client data, knowledge repositories, research insights, tools, and expert talent required for client engagements
Operations	Core service delivery activities – client assessments, analysis, solution design, legal representation, audit execution, project management, and knowledge-based service execution
Product/Service Delivery	Delivering reports, recommendations, legal opinions, compliance documents, or project outcomes and ensuring quality assurance, client sign-off, and handover
Marketing and Sales	Business development, client relationship management, branding, proposal creation, RFP responses, networking, and thought leadership for lead generation
Customer Service	Continuous client engagement – feedback management, ongoing advisory, account reviews, and postengagement support to ensure client satisfaction and retention
Infrastructure and Facility Management	Management of office spaces, digital collaboration platforms, knowledge systems, and secure data environments for hybrid or remote work models
Finance and Accounting	Engagement billing, revenue recognition, expense tracking, partner profit distribution, financial reporting, and compliance with accounting standards
Legal, Risk, and Compliance	Contract management, professional indemnity, client confidentiality, data privacy, and adherence to legal and ethical practice standards
Human Resource Management	Talent acquisition, onboarding, professional certification management, training, career development, performance management, and culture building
Technology Development	Development and adoption of digital tools for analytics, document automation, workflow management, collaboration, client portals, and cybersecurity
Procurement	Sourcing of research databases, technology platforms, office services, and subcontractors while maintaining confidentiality and cost efficiency

Functional Digitalization subdimensions for Manufacturing – Durable and Non-Durable Goods

Value Chain Function	Manufacturing Interpretation
Input Supply Management	Sourcing and management of raw materials, components, parts, energy, and production inputs from suppliers and inventory planning and inbound logistics
Operations	Core production processes including product design, engineering, fabrication, assembly, quality control, and maintenance of production lines
Product/Service Delivery	Warehousing, packaging, distribution, order fulfillment, and logistics to deliver finished goods to customers or distributors
Marketing and Sales	Market analysis, brand positioning, pricing, channel partnerships, B2B/B2C sales, product configuration, and demand generation
Customer Service	After-sales support, warranty and repair management, spare parts delivery, customer feedback handling, and field service operations
Infrastructure and Facility Management	Management of factories, plants, warehouses, energy systems, and equipment maintenance for operational continuity and safety
Finance and Accounting	Cost accounting, production budgeting, pricing analysis, capital investment tracking, and profitability measurement across product lines
Legal, Risk, and Compliance	Product safety compliance, environmental regulations, labor laws, trade compliance, intellectual property, and operational risk management
Human Resource Management	Recruitment, training, shift scheduling, skill development, labor relations, workforce safety, and productivity management
Technology Development	Adoption of Industry 4.0 technologies – automation, robotics, IoT, AI-driven analytics, digital twins, and R&D for process and product innovation
Procurement	Strategic sourcing, supplier management, contract negotiation, and procurement of machinery, materials, IT systems, and maintenance services

Functional Digitalization subdimensions for Retail

Value Chain Function	Consumer Retail Interpretation
Input Supply Management	Procurement and management of merchandise, supplier relationships, inventory inputs, and logistics data to ensure stock availability and cost efficiency
Operations	Core retail operations – merchandise planning, inventory control, store operations, and omnichannel fulfillment management
Product/Service Delivery	Distribution of goods through physical stores, e-commerce platforms, home delivery, or click-and-collect models ensuring a seamless customer experience
Marketing and Sales	Customer acquisition and retention through promotions, loyalty programs, digital campaigns, personalized offers, and omnichannel engagement strategies
Customer Service	Postpurchase support, returns management, loyalty and feedback programs, and issue resolution through digital and in-store channels
Infrastructure and Facility Management	Management of retail outlets, warehouses, distribution centers, and logistics infrastructure for optimal operations and customer access
Finance and Accounting	Sales accounting, inventory valuation, pricing analytics, cost control, supplier payments, and financial performance management
Legal, Risk, and Compliance	Consumer protection compliance, data privacy, product safety standards, contracts, and supply chain risk management
Human Resource Management	Recruitment, scheduling, training, and performance management for store staff, logistics personnel, and customer engagement teams
Technology Development	Implementation of POS systems, e-commerce platforms, customer analytics, AI-driven personalization, and supply chain visibility tools
Procurement	Sourcing of goods, packaging, logistics services, store infrastructure, and digital marketing solutions

Functional Digitalization subdimensions for Casinos, Gambling & Lottery

Value Chain Function	Casinos, Gambling & Lottery Interpretation
Input Supply Management	Acquisition and management of gaming systems, digital platforms, gaming content, payment systems, regulatory licenses, and vendor technology partnerships
Operations	Core gaming operations – casino floor management, gaming system operations, lottery draw management, online betting operations, and compliance monitoring
Product/Service Delivery	Delivery of gaming, betting, and entertainment experiences through physical venues, mobile apps, and online platforms, ensuring secure and seamless gameplay
Marketing and Sales	Player acquisition and retention, loyalty programs, targeted promotions, responsible gaming campaigns, and partnerships with affiliates and sponsors
Customer Service	Player support across digital and physical channels – dispute resolution, account assistance, self-exclusion programs, and responsible gaming support
Infrastructure and Facility Management	Management of casino facilities, gaming equipment, hospitality venues, entertainment arenas, and digital gaming infrastructure
Finance and Accounting	Revenue tracking, payout management, taxation compliance, audit control, financial reporting, and fraud prevention
Legal, Risk, and Compliance	Adherence to gaming regulations, AML controls, responsible gaming laws, cybersecurity, and data protection
Human Resource Management	Recruitment and training of dealers, croupiers, security staff, and customer relations personnel and employee performance and compliance management
Technology Development	Deployment of gaming platforms, AI-driven personalization, fraud analytics, digital wallets, cybersecurity, and omnichannel experience technology
Procurement	Sourcing of gaming machines, software licenses, hospitality supplies, event services, and marketing vendors

Functional Digitalization subdimensions for Hotels, Resorts & Hospitality

Value Chain Function	Hotels, Resorts & Hospitality Interpretation
Input Supply Management	Management of food and beverage supplies, housekeeping materials, linens, amenities, and vendor contracts for property maintenance and guest services
Operations	Core service delivery processes – guest check-in/check-out, room management, housekeeping, food and beverage service, event management, and property operations.
Product/Service Delivery	Execution of guest experiences across rooms, dining, events, wellness, recreation, and concierge services, ensuring consistent service quality
Marketing and Sales	Customer acquisition through digital marketing, travel partnerships, loyalty programs, dynamic pricing, and brand management
Customer Service	24/7 guest support, feedback handling, concierge services, complaint resolution, and personalized experience management
Infrastructure and Facility Management	Maintenance of buildings, rooms, pools, kitchens, restaurants, conference spaces, and energy systems to ensure safety, comfort, and efficiency
Finance and Accounting	Revenue management, cost control, budgeting, billing, vendor payments, and financial reporting across properties and service lines
Legal, Risk, and Compliance	Compliance with hospitality regulations, health and safety standards, data protection, labor laws, and franchise agreements
Human Resource Management	Recruitment, training, and retention of staff across front office, housekeeping, food and beverage, and management roles and ensuring service culture and employee engagement
Technology Development	Deployment of property management systems (PMS), booking engines, CRM, IoT-enabled room controls, and AI-driven guest personalization tools
Procurement	Sourcing food, beverages, room supplies, uniforms, technology systems, and maintenance services while optimizing supplier relationships and costs

Functional Digitalization subdimensions for Sports & Entertainment

Value Chain Function	Sports & Entertainment Interpretation
Input Supply Management	Acquisition and management of talent (athletes, performers), event rights, content assets, sponsorship inventory, and production resources
Operations	Core operations – event scheduling, team or talent management, venue coordination, ticketing, broadcast production, and live event logistics
Product/Service Delivery	Delivery of live and digital fan experiences through venues, streaming, media partnerships, and interactive fan engagement platforms
Marketing and Sales	Fan acquisition, sponsorship sales, merchandising, campaign management, influencer and brand partnerships, and audience analytics
Customer Service	Fan support for ticketing, memberships, digital access, event updates, loyalty programs, and grievance resolution
Infrastructure and Facility Management	Management of stadiums, arenas, production facilities, and digital broadcast infrastructure, ensuring operational readiness and safety
Finance and Accounting	Revenue management from ticketing, sponsorships, media rights, and merchandising and budgeting, forecasting, and financial compliance
Legal, Risk, and Compliance	Contract and IP management, athlete representation, media rights protection, safety compliance, and regulatory governance
Human Resource Management	Talent scouting, training, performance management, athlete wellness programs, and staff recruitment for event and media operations
Technology Development	Fan engagement technologies, streaming platforms, AI analytics for performance and audience insights, and cybersecurity for digital events
Procurement	Sourcing of event logistics, production equipment, merchandising materials, broadcast technology, and digital content vendors

Note: These interpretations were generated and edited Microsoft Copilot based on Michael Porter’s value chain framework (2008).

Functional Digitalization subdimensions for Natural Resources and Mining

Value Chain Function	Natural Resources and Mining Interpretation
Input Supply Management	Procurement and logistics of exploration equipment, fuel, explosives, spare parts, safety gear, geological data, and skilled labor for mining operations
Operations	Core extraction and processing activities – exploration, drilling, blasting, ore extraction, refining, and beneficiation, including real-time monitoring of production sites
Product/Service Delivery	Transportation, storage, and shipment of raw or processed minerals, metals, or energy resources to customers or distribution partners
Marketing and Sales	Commodity pricing, trading, customer contracts, partnerships with distributors and manufacturers, and market intelligence for demand forecasting.
Customer Service	Relationship management with industrial buyers, compliance reporting, sustainability disclosures, and handling of delivery or quality issues.
Infrastructure and Facility Management	Maintenance of mines, refineries, transport routes, power systems, water management, and worker accommodations
Finance and Accounting	Capital project accounting, cost management, royalties, taxation, financial planning, asset depreciation, and production-based revenue recognition
Legal, Risk, and Compliance	Environmental, health, and safety compliance, land use permits, community relations, and adherence to mining laws and ESG commitments
Human Resource Management	Workforce planning, recruitment of engineers and geologists, training on safety protocols, performance management, and labor relations
Technology Development	Deployment of automation, IoT sensors, drones, AI-driven exploration analytics, predictive maintenance, and digital twins for operational efficiency
Procurement	Sourcing of heavy machinery, raw materials, technology systems, third-party contractors, and service vendors supporting exploration and production

Note: These interpretations were generated and edited Microsoft Copilot based on Michael Porter’s value chain framework (2008).

Functional Digitalization subdimensions for Transportation & Logistics

Value Chain Function	Transportation & Logistics Interpretation
Input Supply Management	Acquisition and management of vehicles, fuel, spare parts, transport permits, logistics data, and partner carrier contracts
Operations	Core transportation and logistics processes – fleet management, routing, scheduling, warehousing, cargo handling, and delivery execution
Product/Service Delivery	Delivery of logistics, freight, or passenger services through multimodal networks, tracking systems, and last-mile fulfillment
Marketing and Sales	Customer acquisition, route optimization offers, freight pricing, digital marketplaces, and relationship management with shippers or passengers
Customer Service	Shipment tracking support, delay notifications, claims resolution, passenger assistance, and service feedback management
Infrastructure and Facility Management	Maintenance of depots, terminals, warehouses, and transport infrastructure (ports, rail yards, garages, airports)
Finance and Accounting	Freight invoicing, cost management, tariff optimization, fleet asset accounting, and financial reporting
Legal, Risk, and Compliance	Regulatory compliance (safety, customs, environmental), insurance, contract management, and risk mitigation for operations.
Human Resource Management	Recruitment and certification of drivers, pilots, logistics staff, performance tracking, and workforce scheduling
Technology Development	Deployment of fleet telematics, IoT sensors, logistics management systems, automation, and AI for predictive routing and demand forecasting
Procurement	Sourcing of vehicles, fuel, spare parts, logistics systems, maintenance vendors, and outsourced transport services

Functional Digitalization subdimensions for Utilities

Value Chain Function	Utilities Interpretation
Input Supply Management	Procurement and management of fuel, water, electricity, natural gas, equipment, sensor data, and regulatory inputs required for utility operations
Operations	Core utility processes – power generation, transmission, distribution, water treatment, waste management, grid management, and real-time monitoring
Product/Service Delivery	Delivery of electricity, gas, water, or waste services to residential, commercial, and industrial customers through reliable distribution networks
Marketing and Sales	Customer acquisition, tariff communication, service campaigns, energy efficiency programs, and stakeholder engagement
Customer Service	Billing support, outage reporting, service requests, emergency support, and proactive communication through call centers and digital channels
Infrastructure and Facility Management	Management and maintenance of power plants, grids, substations, pipelines, treatment plants, and utility facilities
Finance and Accounting	Revenue collection, tariff management, financial planning, investment tracking, regulatory reporting, and budgeting
Legal, Risk, and Compliance	Regulatory compliance, environmental standards, health and safety, emergency preparedness, and risk mitigation
Human Resource Management	Recruitment, training, workforce scheduling, performance management, and safety programs for field and operations staff
Technology Development	Smart grid technologies, IoT sensors, SCADA systems, AI for predictive maintenance, analytics for load management, and cybersecurity
Procurement	Sourcing of equipment, materials, IT systems, maintenance services, and third-party contractors to support continuous utility operations

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