

# Digital Transformation Roadmap

A 12-Month Framework for Australian SMBs Ready to Modernise

2026 EDITION

## Phase 1: Foundation (Months 1–3)

- ✓ Audit: Map all current tools, processes, and pain points (use a simple spreadsheet)
- ✓ Data hygiene: Clean CRM, standardise naming, remove duplicates
- ✓ Cloud baseline: Move file storage to SharePoint/Google Drive, email to Microsoft 365
- ✓ Quick wins: Identify 3 manual processes that can be automated in under 2 weeks
- ✓ KPIs: Establish baseline metrics you'll measure transformation against

## Phase 2: Accelerate (Months 4–8)

- ✓ CRM implementation: HubSpot Starter or Zoho CRM — track every customer interaction
- ✓ Marketing automation: Email sequences, lead scoring, automated follow-ups
- ✓ Operations tooling: Project management (Asana/Monday) + time tracking
- ✓ Customer portal: Self-service booking, document sharing, or support
- ✓ Analytics: GA4 + Google Search Console properly configured across all digital properties

## Phase 3: Differentiate (Months 9–12)

- ✓ AI integration: Embed AI into your highest-volume, most repetitive processes
- ✓ Mobile presence: App or progressive web app for key customer interactions
- ✓ Data intelligence: Dashboard giving management real-time business visibility
- ✓ API integrations: Connect key systems to eliminate double data entry
- ✓ Review and reset: What are the next 12-month priorities?

### NEXT STEP

This roadmap is a starting point — every business is different. Book a free 1-hour Digital Readiness Assessment to build your personalised plan.

→ [Book your assessment at ashganda.com](https://ashganda.com)

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