

# Fast forward to digital care

White paper: why digital tops housing providers' agenda



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# WELCOME



**Jeremy Porteus**  
Director, Housing Learning and Improvement Network

In some ways, it is remarkable there is any debate about the move from traditional, analogue-based telecare to digitally enabled solutions. We have been talking about an empowered, discerning and demanding new generation of consumers for a decade or more now.

Specialist housing providers should be responding to that lifestyle demand in this market as in any other.

Digital offers undoubted health, care and support advantages to both the consumer and providers. And the benefits are growing. Digital services help promote independent living, something we know consumers want, and that the government has been promoting.

The original research for this important report, a survey of around 80 senior executives from across the sector and a roundtable I chaired, presents a multi-layered picture. There is recognition that tech-savvy retirees want reliable broadband. And providers grasp the transformative impact telecare delivers for the health and wellbeing of residents.

But many seem uncertain how urgently they need to respond. As this report makes clear: the time for contemplation is over. Let's embrace the digital revolution for the good of the sector, of our partners and, most importantly, for the benefit of our customers.



**Carl Atkey**  
Chief Technology Officer, Appello

Housing associations face a period of unprecedented change. It's driven partly by policies and economics, but more importantly by opportunities made possible by digital technologies.

This digital revolution takes place as the UK telecommunications infrastructure is shifting from analogue to digital. Internet Protocol (IP) is becoming the bedrock of communications.

That creates challenges for retirement housing and care providers. For instance, analogue systems (such as telecare alarms) may be incompatible with digital networks.

But it also presents significant opportunities. Digital leaders can leverage the speed, scalability and data richness of this new infrastructure and communications protocol to deliver affordable, contemporary, person-centred care and promote wellbeing.

The move from analogue to digital or IP systems is the first step in transforming the home and some housing organisations are embarking on that journey and are leading the way in the provision of care to the older generations of today.

This report shows that others are ready to join the digital agenda.

# GET READY FOR THE DIGITAL ERA

## Digital technology promises to revolutionise telecare housing provision. But how ready is the sector?

This is the first in a series of reports and events exploring digital telecare transformation in the retirement housing sector.

Digital care or telecare encompasses the provision of assisted living, self-care and monitoring services, that are founded on IP-based technologies. It is an approach favoured by many in the sector and at the highest levels.

That's because digital solutions can transform the way people live, communicate and manage their own health. At the same time, digital solutions offer service providers deeper insight into people's requirements, enabling them to offer better, more personalised support. And, tantalisingly it offers the potential to cost-effectively improve outcomes.

But the journey from analogue to digital is not well understood. What are the drivers behind the digital revolution, the key challenges — and strategies for overcoming them?

The report is for decision makers at housing associations and providers of retirement housing, policy makers, local authorities, charities, housebuilders, and anyone involved in the provision of services for independent living for our ageing population.

This report is based on two unique sources of insight: a roundtable debate featuring some of the leading thinkers in retirement housing, as well as primary online research.

The research and roundtable were devised by Appello, a leading provider of digital care services in partnership with the Housing Learning and Improvement Network (LIN). The survey polled 80 senior executives from providers of retirement housing, local authorities and those responsible for delivering support to older people at home. The result is the one of the most comprehensive studies of attitudes towards digital care within the sector.

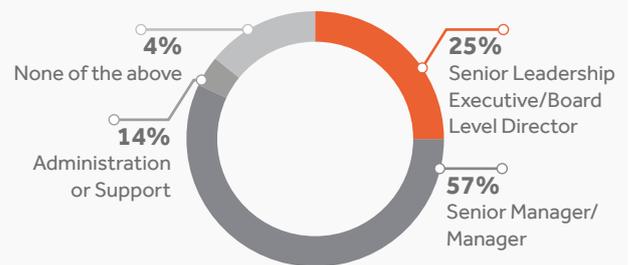
Survey respondents came from organisations, ranging in size from fewer than 100 staff to those employing more than 5,000. The survey polled a variety of functions, including strategy, finance, IT, operations, and care and support — ensuring that the results cover a broad cross-section of viewpoints.

The roundtable was chaired by Jeremy Porteus, Director of Housing LIN, and the opening address came from Gill Leng, National Lead, Health and Homes for Public Health England.

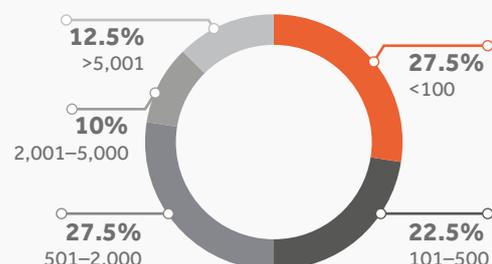
### Our thanks for their participation go to:

- Carl Atkey, Chief Technology Officer, Appello
- Jane Barker, Managing Director, Places for People
- Tim David, Head of Asset Management, Housing & Care 21
- Chris Munday, Executive Director, Hanover Housing Association
- Colin O'Neill, Strategic Planning and Change Manager, Genesis Housing Association
- Keith Shields, Managing Director, FirstPort Retirement Property Services
- Paul Watson, Managing Director, Guinness Care and Support, The Guinness Partnership

**Fig 1.** Which best describes your current role?



**Fig 2.** How many employees does your organisation have?



# GETTING READY FOR A DIGITAL FUTURE



**An ageing population, the lack of suitable housing and shifting customer expectations are changing the retirement housing sector.**

## THE UK FACES A SHORTAGE OF SUITABLE HOUSING

A storm is brewing in the UK housing sector. For a start, the population is growing and ageing. By 2039 there will be 9.9 million people in the UK aged over 75, reports the Office of National Statistics, nearly double the number in 2012.<sup>1</sup> That means more appropriate houses for older people will be needed, and the types of accommodation required will change, to reflect their diverse needs.

At the same time, attitude towards housing is changing. Today, retirees expect housing that meets their lifestyle preferences. That means housing that supports independence in later life, and that helps them enjoy full and active social activities.

Further pressure to change housing services is coming from government. It wants health and social care services to develop cost-effective and preventive care and support alternatives — with greater emphasis on integrated approaches that allow for management of chronic conditions in the home.

## THE HOUSING SECTOR IS UNDER PRESSURE

But the UK has been slow to respond and is faced with a housing shortage: 200,000 new homes need to be built every year just to keep pace with existing demand across the whole population. Currently, just 145,000 houses are being built.<sup>2</sup>

What's more, government initiatives to tackle the housing shortage are focussed on first-time buyers. At present, 5,500 new retirement housing properties are constructed a year, accounting for 3% of estimated housing delivery.<sup>3</sup> Knight Frank reports that this needs to be escalated to 30,000 to meet rising demand.<sup>4</sup>

On the revenue front, plans to cap Housing Benefit for people in supported housing at Local Housing Allowance (LHA) rates were published by the Government in its Supported Accommodation 2016 Review.<sup>5</sup> The future funding of supported housing, including sheltered and extra care housing, has raised serious concerns in the sector that this type of provision, one of the largest segments of supported housing, will not be sustainable in the future.

However, there are encouraging signs. In a programme that the Government bills as a "decisive shift" towards support for home ownership, it is making nearly £5bn available to build over 150,000 homes, meeting a range of ownership and development options. This injection is coming as capital grant to kickstart the five-year shared ownership and affordable homes programme unveiled by the Homes and Communities Agency (HCA)<sup>6</sup>.

Overall, £4.7bn, spent between 2016–2021, is intended to deliver starts on sites for at least 135,000 homes for Help to Buy: Shared Ownership, 10,000 homes for Rent to Buy, and 8,000 homes for supported and older people's rental accommodation. Funding for the new homes outside London will be allocated by the HCA.

By 2039 there will be  
9.9 million people in  
the UK aged over 75.

Office of National Statistics

## THE FUTURE IS DIGITAL

There is no single solution that will balance the changes in housing needs with economic pressures. Nonetheless, there is widespread recognition that digital solutions — ones that use IP technologies — must form part of the answer.

For instance, the Care Act 2014 sets out a framework for future social care provision which identified telecare as a core component to deliver person-centered care and support to older and disabled people. Telecare encompasses technology, such as panic buttons and concierge services, to support independent living and to give providers better insight into individuals' needs.

Elsewhere, the HAPPI 3 report<sup>7</sup>, published by the All Party Parliamentary Group on housing and care for older people, called on housing associations to “use new connected home technologies to provide greater autonomy and control” for residents, to ensure that their accommodation meets their needs.

Digital care can provide high-quality alternatives to analogue systems, such as warden call. But more importantly, digital solutions provide a tool for innovation because they enable providers to collect data that informs their customer understanding and the ability to layer on additional services.

But while there is consensus over the need to go digital, it represents a sea change for today's housing providers. Many of the telecare systems deployed today have not changed over the past 30 years. These systems are largely still analogue-based and frequently incompatible with modern, feature-rich digital systems.

This paper explores some of the rationales for moving away from analogue based systems and examines the readiness of existing providers for this transformation.

The impetus driving digital care initiatives doesn't just come from government. It's a core component of many care providers' existing strategies. The main priorities the senior executives in the housing sector identified in our survey were improving customer experience, reducing costs and using data to better understand customer needs.

“One of the problems, or prejudices is that we make assumptions that people over a certain age wouldn't be interested in technology. We've analysed in the past how people are accessing our website on sales. It's amazing how many are using an iPad or mobile device.”

Jane Barker  
Places for People

**Fig 3.** What are your top priorities for 2017?



1. Improving the customer experience



2. Reducing costs



3. Creating a better understanding of customers through data and insight

### The benefits of digital care

- **Improve the customer experience.** Giving residents access to broadband internet services can be a simple way to improve the quality of care provision for many people. After all, internet services are increasingly regarded as an essential part of our lives. 88% of adults in the UK regularly access the internet. And internet technologies can be used to enhance other services, enabling high quality video and voice calling.
- **Service innovations.** Digital platforms provide the ability for richer integration of devices and services that can be personalised. Deployment of apps promoting lifestyle, self-service, alert reminders or messaging services can easily be integrated and the data dashboarded to provide a holistic view of an individual. Service innovation like these can help support a superior customer experience and stronger analysis of a customer's current and future needs.
- **Business improvements.** Digital systems give you the data you need to drive performance improvements. You can collect and analyse data — such as adherence to medicine routines — that give you the information you need to improve residents' lives.

The rest of this report explores the shift towards digital care, looking at the goals housing providers have set themselves and their digital strategies.

#### THE DIGITAL ADVANTAGE

**Fast connections.** Emergency telecare calls connect much faster than analogue systems: average connection times come down from roughly 1 minute 40 seconds to under 4 seconds.

**Future-ready infrastructure.** IP-ready infrastructure is compatible with new UK digital network, future proofed against changes in the UK network.

**Resilient connections.** Star-wired Cat 5 cabling enables high-speed data transmission. Device/cable faults don't affect the whole network — unlike a radial, analogue environment.

**Inclusion.** Video calling via tablet apps supports improved communication between residents and staff, and greater safety through video door entry.

**Activity logging.** Digital care supports enhanced data collection for reporting for refinements, audit purposes and security.

**Multiple simultaneous calls.** With digital systems, there's no call queuing — so door entry calls no longer block emergency telecare calls.

**Richer data.** Digital care enables huge amounts of information to be collected — for instance, alarm calls can include information that identifies the caller.

# DIGITAL CHANGE IS COMING

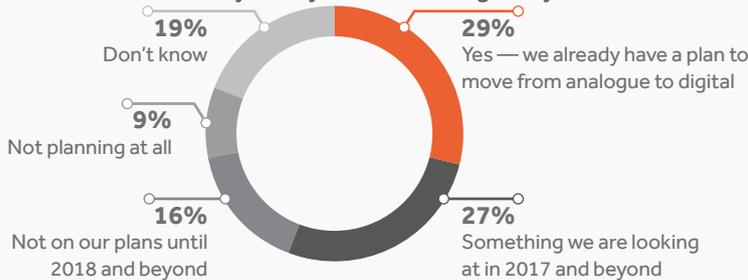
Housing providers demonstrate a strong appetite for change.

## DIGITAL HAS BECOME A WAY OF LIFE

Digital has become the primary means of communication across all aspects of our lives. From collaborating with work colleagues via email or messaging, to keeping up with family and friends via social media and video calling. Why should housing providers be any different? They need to take full advantage.

The benefits digital can deliver are clear. That's why over 55% of retirement housing providers are actively planning to move from analogue warden and community call systems to digital. A mere 9% said they weren't planning to change their systems.

**Fig 4.** Is your organisation looking to change from traditional analogue warden/community call systems to IP/digital systems?

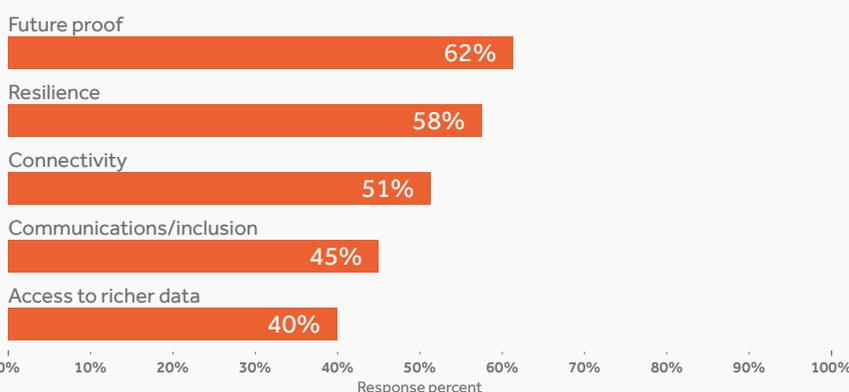


56% of housing organisations already have plans to move from a traditional analogue warden/community call system to a digital system.

When we dig deeper into the benefits providers expect to accrue from their digital investment, it becomes clear that many are keenly aware of the limitations of their existing infrastructure. When asked to pick their top three benefits, respondents overwhelmingly identified the need to future proof their business — a clear indication that they understand the extent of change underway in the sector.

The other top two choices were resilience, including the making of multiple simultaneous calls or alerts, and the ability to integrate communications across housing, health and social care.

**Fig 5.** What do you see as the key benefits of a digital care system?

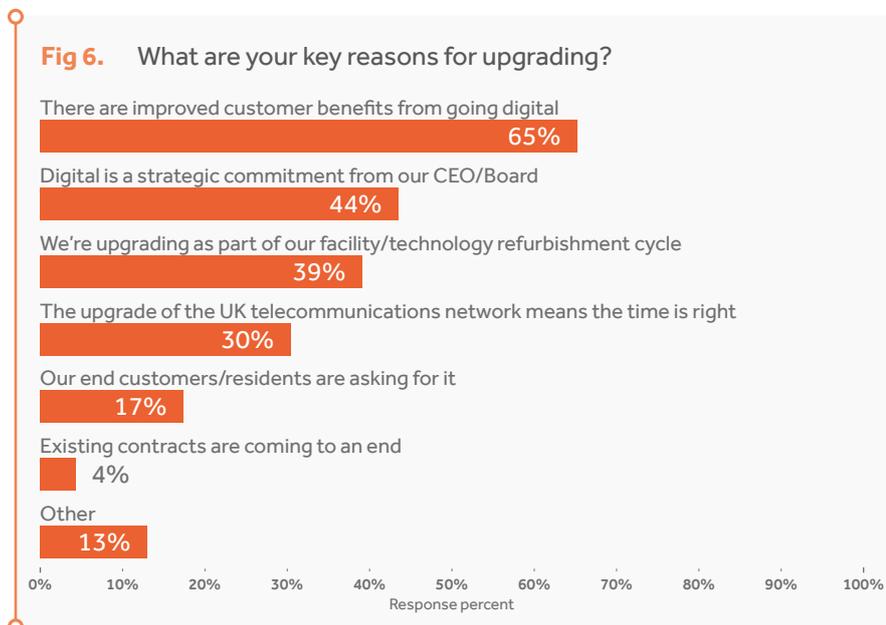


## PUTTING CUSTOMERS FIRST

So, what's driving housing providers to embark on digital initiatives? Our survey showed that 44% of CEOs and management boards have made a strategic commitment to digital. That's not surprising given the demand for new services from future downsizers. The over 55s are the fastest adopters of internet usage.

But the board-level goal was not the reason most respondents gave for the move to digital services. Two-thirds of participants identified benefits for customers as the key advantage of a digital care system. That suggests housing providers are not only mindful of their need to deliver customer satisfaction, but they already understand the benefits that digital systems offer.

Jane Barker, managing director at Places for People Retirement, told our roundtable that digital capabilities are increasingly becoming a key selling point for potential customers.



"For us digital is about making life better for people who live in independent living and making life easier and simpler and it makes our services more efficient and cost effective. It is a selling point too," she says.

## UNLOCKING INSIGHT: THE POWER OF DATA

Digital care systems are giving housing providers an opportunity to collect and analyse data to improve levels of support and the customer experience.

In doing so, housing associations will move from providing simple transactional services to delivering complementary services, that help residents achieve their own goals and outcomes — such as economic wellbeing, financial inclusion, health, and community cohesion and development.

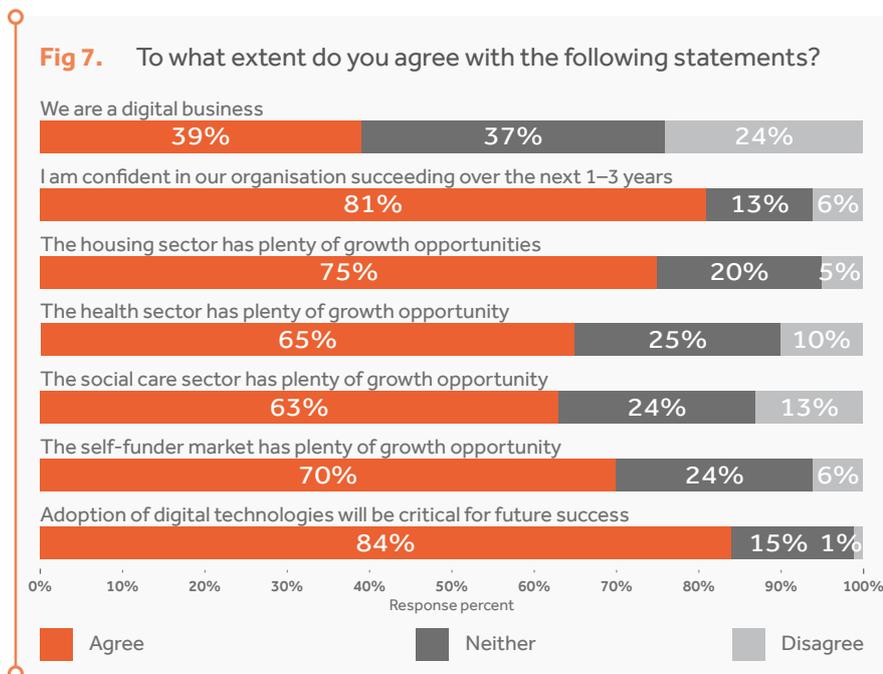
# OVERCOMING BARRIERS TO CHANGE

A lack of joined up thinking and commercial awareness is slowing progress.

## GETTING READY FOR A DIGITAL FUTURE

We've seen huge support by housing providers for the transition towards being a more digital business: 84% of housing providers agree or strongly agree that the adoption of digital technologies will be critical for their future success.

But barely a third (39%) say that they are a digital business today. So, what's holding organisations back?



84% of housing organisations say that digital technologies will be critical for future success, but only 39% say they're a digital business today.

## LACK OF AWARENESS STIFLING INNOVATION

With any big organisational change, the chief barriers typically involve the fear of the unknown, the perceived cost of change and lack of support from partners.<sup>8</sup>

But when we questioned our respondents about the reasons for not going digital, a very different picture emerged.

Although we noted above that 44% of the people we surveyed said their CEOs and boards had made a strategic commitment to digital, in other organisations it appears a lack of support and understanding of digital is holding back investment decisions.

A lack of support from the wider organisation is the most commonly cited reason for not going digital. Just over a third (34%) said their organisation needs further education about the benefits of digital care.

As Chris Munday, Director of Operations at Hanover Housing Association, told the roundtable delegates, the business case behind digital isn't always widely appreciated.

That's reflected in where digital decisions lie within the organisation: in many cases, digital decisions are not made by the CTO or Head of Digital Services, but by other business departments. This may be because the position of Chief Digital Officer is still relatively rare in housing.

So, while most housing providers have already embarked on digital transformation (see Figure 4), internal barriers remain a significant obstacle for some.

"At present digital can be an addition to businesses, and does not have a sufficiently strong business case. But we appreciate that our business will only transform by embracing digital, so this position is gradually shifting."

Chris Munday  
Hanover Housing Association



Alongside internal resistance, many of the organisations we polled felt their technology partners were holding them back. Nearly a third of respondents (31%) said the contract they have with their existing supplier was the chief reason for not going digital. This reflects the fact that some suppliers don't offer digital services, while others want to sweat their investments in analogue technology for as long as possible.

### CASE STUDY: HOUSING & CARE 21

While the housing and care industry still largely operates on analogue systems, Housing & Care 21 (H&C21) has decided to take a different route.

H&C21 has embarked on a digital journey to improve their residents' experience. As a part of its forward thinking digital strategy H&C21, turned to Appello to develop the UK's first end-to-end IP care system. This ground-breaking solution can transmit emergency calls in under 4 seconds. That's a big improvement on the 90 seconds it took the legacy systems. And multiple calls for help can now be handled simultaneously.

Benefits go far beyond these safety developments. Digital Telecare can also harness greater data and insight central to better decision making. The system also enhances the sense of community and inclusivity, with residents now able to communicate with local court managers through video chat.

Housing & Care 21 introduced an IP-based care system to a managed housing development in County Durham, Walton Court in Spring of 2016. It aims to have over 20 schemes live nationally by the beginning of 2017.

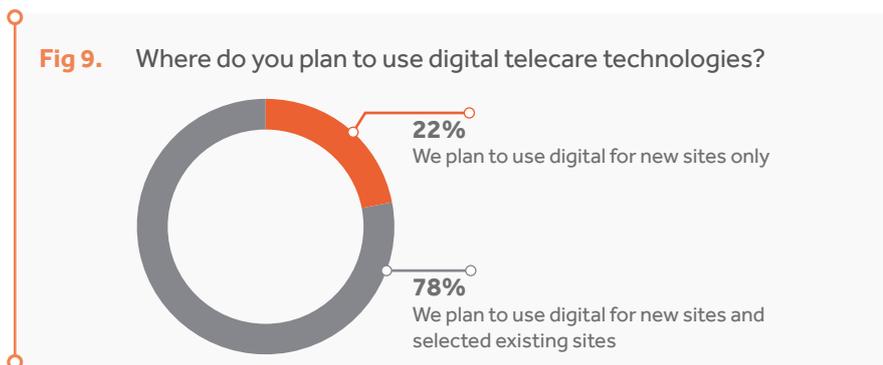
## CHANGE ACROSS THE BOARD

It is easy to assume that cost often prevents investment in digital services. After all, the costs associated with rewiring existing premises can make a dent in the annual facilities budget.

However, cost did not feature in the top three reasons for holding back on digital services.

That suggests most executives in the care sector are aware that investment may be needed to reap the rewards digital can provide.

Companies' plans to install digital services in existing housing sites support that view. If upgrade costs were a significant hurdle, investment would be prioritised in greenfield sites.



"We're taking a stance that all new developments, and replacements at existing developments, should be digital."

Tony Tench  
Housing & Care 21

In fact, just over a fifth said they planned to install digital telecare systems in greenfield sites only. 78% said digital would be rolled out across green and brownfield sites.

As Tony Tench, Chief Operating Officer at Housing & Care 21 explains, it might only make financial sense to upgrade existing developments when current systems need replacing, but customer appetite for digital services means that his firm will be upgrading all facilities.

"The expectation of our residents continues to rise in line with the possibilities a digital world brings. At a practical level, we're taking a stance that all new developments, and replacements at existing developments, should be digital," he says.

### DIGITAL TELECARE: THE WAY FORWARD FOR NEW EXTRA CARE DEVELOPMENTS AT GUINNESS CARE SND SUPPORT

Guinness Care and Support, part of The Guinness Partnership and one of the largest affordable housing and care providers in the country have made the move to deploy digital telecare and communication systems into their new flagship extra care scheme, Quayside in Totnes, South Devon.

"We're here to improve people's lives – and create possibilities for them. Delivering the best customer experience and providing technology solutions that can scale in-line with our customers needs and our innovative aspirations, were key factors in our decision making for Totnes and future extra care developments", stated Paul Watson MBE, Managing Director, Guinness Care and Support.

The 60 apartments will open in the Autumn of 2017 and the digital focus will help support the quality and premium positioning of Quayside, Totnes.

# THREE STEPS TO DIGITAL SUCCESS

Successful adoption of digital technology depends on three key factors.

## 1 DRIVING CHANGE FROM THE TOP

Digital care and health systems have enormous potential to improve the management of health and wellbeing, transforming services through the collection and analysis of data.

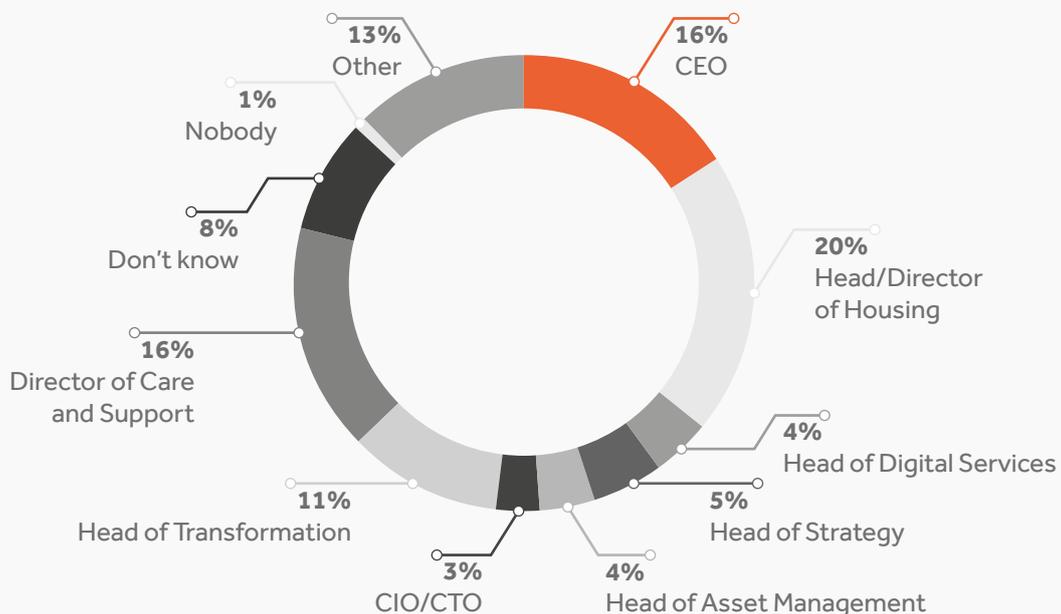
However, the success of digital care initiatives isn't about replacing analogue and paper-based processes with digital alternatives. It means using digital technologies to improve services and outcomes for customers and to cut costs.

The extent of the resulting change is reflected in who retirement housing providers believe should lead digital change. This survey question produced the widest range of responses, but the three most popular answers were: the director of housing, the CEO and the director of care and support.

Tellingly, this digital transformation was not widely seen as a technology project. Just 3% felt that the CIO or CTO should lead digital initiatives.

3% felt that the CIO or CTO should lead digital initiatives.

Fig 10. Who in your organisation would be the most likely to lead your digital telecare initiative?



## 2 PARTNER WISELY

The implementation of digital care programmes is likely to be a complex, multi-year project.

Hanover Housing Association's Chris Munday cautions that it may be difficult to acquire all the skills necessary to deliver such programmes internally.

He says: "Making digital adoption happen will need to involve a combination of organisations and individuals."

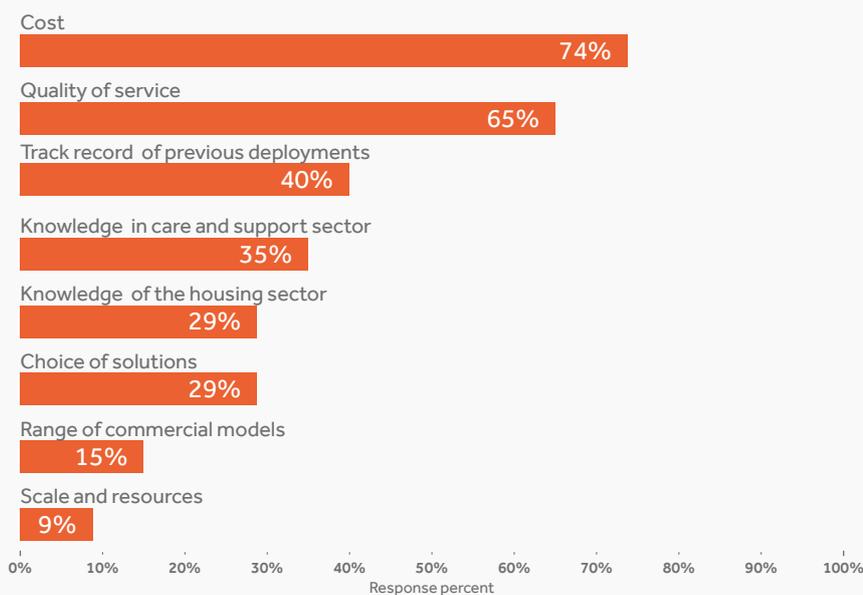
That's why our survey explored retirement housing providers' key criteria when it came to choosing a digital partner.

Unsurprisingly, cost and service quality were the most important. No organisation can afford to issue a blank cheque for digital transformation. And where companies are investing, they want to be sure they get a high-quality service.

But it was notable that providers see knowledge and experience of the care and housing sector as very important — some 40% of respondents identified this as a factor in choosing a provider. Only cost and quality scored higher.

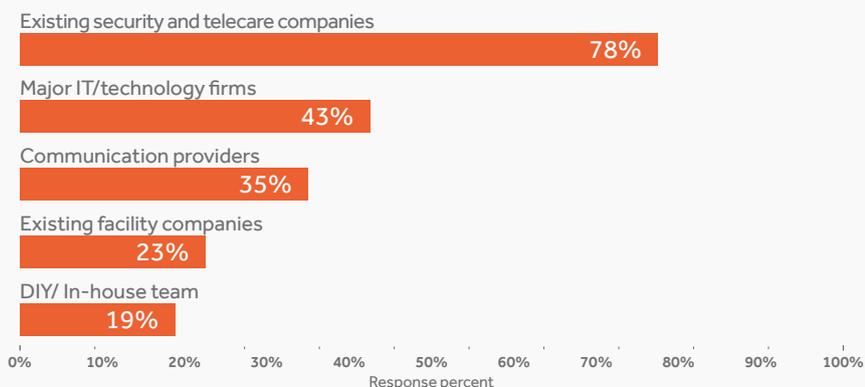
Respondents rated a track record of delivering digital, and knowledge of the sector, as important factors in their choice of provider..

**Fig 11.** What are the main factors you'd consider when choosing a provider?



The need to understand the sector was further emphasised by providers' choice of partners. When asked which external providers they would consider for digital care initiatives, the overwhelming majority identified existing security and telecare companies (78%) — far more than chose large technology specialists, such as Microsoft or IBM (43%) or communications firms such as BT or Virgin Media (35%).

**Fig 12.** Which kinds of external provider would you consider for your digital care initiatives?



### 3 CREATING THE BUSINESS CASE FOR CHANGE

Like all transformation programmes clear objectives need to be agreed and a business case for change set out. Many of the benefits have been highlighted but there may be specific benefits to a particular provider depending on their short and longer term strategy and direction.

For some the case could be in line with the findings and recommendations of the HAPPI3 paper. Digital care can be aligned around providing greater lifestyle choices and 'care-ready' approaches of an ageing population. Or it could be fundamentally based on the current infrastructure i.e. analogue, just not being acceptable for today's retirement housing sector.

Closely linked to the business case is a thorough review and scope of what the requirements are and the potential solution/services that need to be sourced to meet the brief. This will save potentially costly scope creep and delays in implementation of the solution.

Housing & Care 21's Tim David, Head of Asset Management, agrees more needs to be done: "The housing and care industry has been slow to commit to a move to digital care systems, and while we are now seeing this change, there is still much to be done. The entire supply chain has to get behind the movement from analogue to digital if the barriers to adoption, are to come down."

# RECOMMENDATIONS

## DON'T DELAY

As an industry we must start looking at what the housing sector will look like in the next 10-20 years. And the technology is here now.

It's a fact of life that we all need to do more with less in the public sector. Recent funding pressures such as potential changes to the local housing allowance are unlikely to cease and our society will age.

Digital change is coming. Whether you choose to be at the forefront of the digital housing revolution, or you take a more cautious stance, you still need to plan for change today.

Research has shown that the top priorities for today's housing providers are: improving the customer experience, reducing costs and improving understanding of customers. Digital solutions are critical to delivering this.

New innovations, ideas and joined up digital technologies can accelerate the home of tomorrow, today. But, as we've seen, change is hard. How can digital business practices be embedded in your organisation's culture? What does the shift to digital mean for your investment in legacy systems?

We'll be exploring the fundamentals of successful digital transformation strategies in subsequent reports.

## ABOUT THE HOUSING LIN

The Housing LIN is a sophisticated network bringing together over 40,000 housing, health and social care professionals in England and Wales to exemplify innovative housing and technology enabled solutions for an ageing population. Recognised by government and industry as a leading 'knowledge hub' on specialist housing, our online and regional networked activities:

- Connect people, ideas and resources to inform and improve the range of housing choices that enable older and disabled people to live independently.
- Provide intelligence on latest funding, research, policy and practice developments, and raise the profile of specialist housing with developers, commissioners and providers to plan, design and deliver aspirational housing and services for an ageing population.
- For information about the Housing LIN's comprehensive list of online resources on housing and telecare, visit our dedicated online pages.

## ABOUT APPELLO

Appello is committed to widening the debate about digital health, and has led the way in gathering industry leaders to talk and debate the issues in a series of roundtable events.

We have over 27 years' experience providing technology-enabled care and life safety services that help housing, health and social care organisations to deliver better outcomes — ones that improve the lives of their customers, patients and residents.

We harness technology innovation to support the different aspects of integration in care provision and leverage digital technologies to create smarter homes to deliver life-improving health, inclusion and support. At the heart of our operations is the UK's leading digital care services centre, which is supporting the health, safety and security of 170,000 people throughout the UK.

### Supporting digital change at the highest levels

Appello has a strong commitment to driving digital transformation in the care sector, and is a partner in the government-backed Digital Inclusion Charter, which is working to bridge the gap between the online and offline worlds.

We've advised the government on a range of care issues, for instance we were recently consulted about the Housing and Care for Older People All Party Parliamentary Group's HAPPI3 report which focuses on digital progress and created roundtable forums to exchange knowledge share on digital care advancements in housing.

To find out more about future roundtables, our services, or to book a digital workshop, please contact our digital team: [digitalnow@appello.co.uk](mailto:digitalnow@appello.co.uk)

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