
VERMONT AGENCY OF DIGITAL SERVICES

Operational Efficiency

COMPASS – Guiding Successful Business Transformation Efforts

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Executive Summary

In 2025, the Agency of Digital Services initiated a pivotal organizational change, establishing the Business Transformation Office (BTO) to enhance the execution of transformation initiatives across the Executive Branch of State Government. The BTO's mission is to align technology initiatives with strategic objectives, streamline processes, and foster continuous improvement across state agencies.

COMPASS Intake Process

The BTO's first priority was developing COMPASS, a new intake process for agencies seeking assistance with initiatives, whether technological or not. COMPASS stands for Collaboration, Optimization, Measurement, Planning, Adaptation, Strategy, and Success. It focuses on:

- Aligning transformation strategies with business objectives
- Implementing a governance framework
- Coordinating multiple workstreams
- Managing organizational change and stakeholder engagement
- Tracking transformation benefits
- Fostering continuous improvement
- COMPASS ensures initiatives work harmoniously towards common goals.

The BTO assembled a diverse team to improve the legacy intake process, resulting in Vermont's COMPASS program. A structured Intake and Triage process was established, conducted weekly to manage new business requests efficiently. This process aligns requests with strategic goals and ensures prompt attention.

The COMPASS intake process has strengthened Vermont's ability to execute transformation initiatives by standardizing request evaluation and prioritization. This structured approach enhances decision-making, transparency, and resource allocation, fostering continuous improvement and driving better outcomes for Vermonters through coordinated digital transformation efforts.

Idea

In 2025, the Agency of Digital Services embarked on an organizational change that led to the creation of a Business Transformation Office. The purpose of the Business Transformation Office (BTO) is to drive results by standardizing processes, ensuring alignment and removing roadblocks, thereby enabling effective execution of transformation initiatives across the Executive Branch of State Government. Our mission is to align technology initiatives with strategic objectives, streamline processes, and foster a culture of continuous improvement across all state agencies and departments.

The BTO's initial priority was to create and implement a new intake process for all agencies to use when seeking assistance for a new initiative. These initiatives may or may not require a technological solution. The name of this new intake process is referred to as **COMPASS**. The acronym stands for:

C – Collaboration

O – Optimization

M – Measurement

P – Planning

A – Adaptation

S – Strategy

S - Success



The focus of COMPASS includes:

- Developing and aligning transformation strategies with business objectives
- Implementing a robust governance framework for transformation initiatives
- Coordinating and aligning multiple workstreams and initiatives
- Managing organizational change and stakeholder engagement
- Tracking and measuring the realization of transformation benefits
- Fostering a culture of continuous improvement

COMPASS takes a holistic view of the entire transformation journey, ensuring that all initiatives are working in harmony towards a common vision and desired outcomes.

Implementation

Navigating Innovation: The Creation of the COMPASS Process

The BTO team assembled an intake process improvement team inclusive of business partner agency representatives, the Chief Performance Officer from the Agency of Administration, and members of the Agency of Digital Services PMO and Enterprise Services teams. This team spent several months collecting feedback from State partners regarding the legacy intake process, identifying areas for improvement, documenting current and future state diagrams and then working towards the development of a new process that would provide a better customer experience, provide data to better inform decision making and prioritization of incoming work and lead to better outcomes for Vermonters. The output of this work led to the creation of Vermont's COMPASS intake program.

The team implemented a structured Intake and Triage process, which is conducted every Monday as needed, to efficiently manage new business requests. This process ensures that each request is thoroughly reviewed and appropriately directed, aligning with the strategic goals of the agency.

The primary goal is to receive, review, and make initial decisions on new business requests submitted to ADS, ensuring they align with strategic priorities and are addressed promptly.

Process Overview:

Intake Submission: Requestors complete the ADS Business Intake Form, which is then sent to a shared mailbox for triage.

Triage Review Meeting: The Business Transformation Advisory Board (BTAB) team convenes to review new requests. Key discussion points include:

- Aligning on the business problem or opportunity.
- Ensuring alignment with the Business Agency/Department Strategy.
- Assessing the urgency of the request, including any legislative mandates and desired start dates.
- Defining desired business outcomes.

Output of the Triage Meeting: The team determines the appropriate workflow for each request:

- Business Transformation: Directed to the Business Transformation workflow.
- Project Management: Directed to the Enterprise Project Management Office (EPMO) workflow.
- Operations: Directed to the Operations workflow.
- Other: If none of the above categories fit, next steps are determined during the triage.

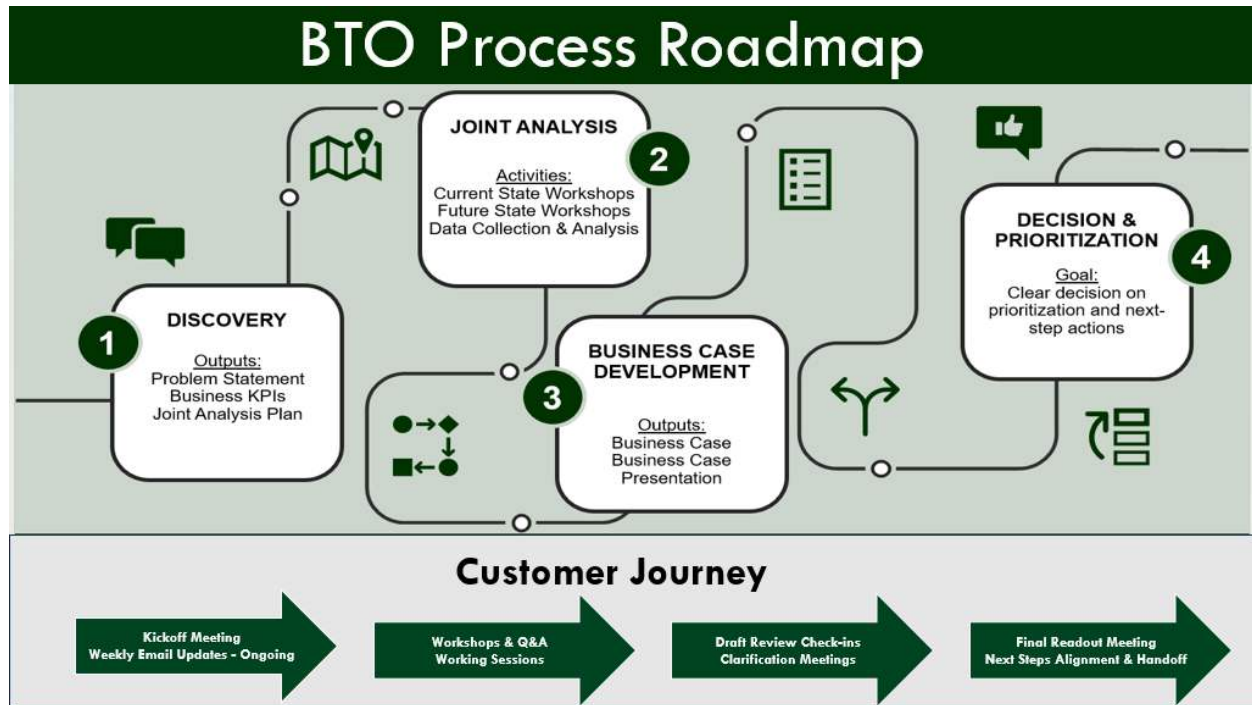
Deliverables:

- Documented discussion points, including the business problem/opportunity and strategy alignment.

- A decision record from the triage meeting, indicating the appropriate workflow (BTO, PMO, Operations, or Other).
- Assignment of a lead from the relevant ADS unit to ensure follow-through.

This structured approach not only enhances efficiency but also ensures that all business requests are aligned with the strategic objectives of the agency, facilitating effective business transformation.

Exhibit 1: Process Roadmap



Discovery Phase: Laying the Foundation for Success

In the Discovery Phase, our primary aim is to establish a clear understanding of the business challenge at hand and prepare the organization for effective change. This phase is crucial for setting the stage for successful outcomes.

We begin by defining the problem to ensure all stakeholders have a shared understanding of the issues we aim to address. This clarity is essential for aligning efforts and resources effectively.

Next, we identify the key performance indicators (KPIs) that we seek to improve. By establishing these metrics, we can measure progress and success, ensuring that our efforts are focused and impactful.

An important consideration is assessing whether the organization is ready for change. This involves evaluating the current environment, resources, and willingness to embrace new processes or technologies. Understanding readiness helps us tailor our approach to maximize acceptance and effectiveness.

Finally, we develop a plan for joint analysis, fostering collaboration between stakeholders. This plan outlines how we will work together to analyze data, share insights, and make informed decisions, ensuring that all perspectives are considered and integrated into the solution.

Through this comprehensive Discovery Phase, we aim to build a solid foundation for transformation, ensuring that our initiatives are well-defined, measurable, and aligned with the organization's capacity for change.

Joint Analysis Phase: Charting the Course for Transformation

The Joint Analysis Phase is a collaborative effort designed to thoroughly understand the current state of operations and envision a future state that aligns with strategic goals. This phase is critical for identifying opportunities for improvement and developing a clear path forward.

We begin with Current State Workshops, where we engage stakeholders to map out existing business processes and context diagrams. During these sessions, we identify pain points and document business rules, providing a comprehensive view of the current operational landscape.

Following this, we conduct Future State & Path Forward Workshops. In these sessions, we collaboratively design future business process diagrams and develop user stories that capture desired outcomes. We assess the impact and effort required for proposed changes, considering enterprise-wide implications to ensure alignment with broader organizational objectives.

Throughout the Joint Analysis Phase, data collection and analysis play a pivotal role. By gathering and examining relevant data, we gain insights that inform decision-making and help prioritize initiatives based on their potential impact and feasibility.

This phase is essential for building a shared vision of the future and establishing a roadmap for achieving it. By working together, we ensure that all perspectives are considered, leading to solutions that are both innovative and practical.

Business Case Development Phase: Building the Case for Change

In the Business Case Development Phase, we leverage insights and artifacts from the Joint Analysis to construct a compelling argument for transformation. This phase is crucial for securing the necessary support and resources to implement proposed changes.

We begin by creating a comprehensive Business Case. This document synthesizes findings from the Joint Analysis, clearly articulating the problem, proposed solutions, and anticipated benefits. It serves as a strategic blueprint, outlining how the initiative aligns with organizational goals and addresses identified pain points.

Next, we develop a Funding and Resource Allocation Summary. This component details the financial and human resources required to execute the proposed changes. By providing a clear picture of the investment needed, we facilitate informed decision-making and ensure that resources are allocated efficiently.

Finally, we prepare a Business Case Presentation. This presentation is designed to communicate the key elements of the business case to stakeholders, highlighting the value and impact of the proposed initiatives. It serves as a persuasive tool to garner support and commitment from decision-makers.

Through the Business Case Development Phase, we aim to build a strong foundation for action, ensuring that all stakeholders understand the rationale, benefits, and requirements of the proposed transformation.

Decision Prioritization Phase: Aligning on Strategic Priorities

The Decision Prioritization Phase is where we present our findings and recommendations to key stakeholders, aiming to secure alignment and commitment for the proposed initiatives. This phase is essential for determining the strategic direction and next steps.

We begin by presenting the Business Case and BTO recommendation to the Business Lead and decision authority. This presentation encapsulates the insights and proposals developed during earlier phases, providing a clear and compelling narrative of the transformation opportunity.

The primary goal of this phase is to obtain a decision on prioritization and to outline the next steps. By engaging decision-makers in this process, we ensure that the proposed initiatives are aligned with organizational priorities and have the necessary support to move forward.

Through the Decision Prioritization Phase, we aim to achieve consensus on the strategic path, enabling the organization to focus resources and efforts on initiatives that deliver the greatest value and impact.

Impact

The creation of the COMPASS intake process has significantly strengthened the State of Vermont's ability to execute transformation initiatives by standardizing how new requests are evaluated, prioritized, and aligned with strategic objectives. By introducing a structured, collaborative intake and triage process, the Business Transformation Office has improved decision-making, increased transparency, and ensured that resources are directed toward the most valuable, strategically aligned efforts. This consistent, data-informed approach enhances efficiency across agencies, fosters a culture of continuous improvement, and ultimately drives better outcomes for Vermonters through more coordinated, effective, and accountable digital transformation work.