

Terms of Reference for Consultancy on Digital Transformation for COPANT member NSBs

1. Introduction

This consultancy aims to support the National Standardization Bodies (NSB) members of COPANT, jointly, in their digital transformation process.

2. Background

COPANT member NSBs have expressed interest in advancing the digital transformation of their organizations to improve the efficiency, quality and relevance of standardization services.

3. Objectives of the Consultancy

Digital transformation consulting has the following objectives:

- **Facilitate strategic understanding of digital transformation:** To help NSBs strategically understand digital transformation from a strategic approach, examining the impacts of digital innovation on current and future business models, organizational structures, governance and organizational culture. The goal is for participants to recognize the importance and significance of digital transformation and understand its benefits to services and the standardization process.
- **Acquire key knowledge:** Provide participants with a solid understanding of the fundamental elements that make up a digital transformation process in an NSB. This knowledge will serve as a solid basis for the definition of an action plan, under the responsibility of each NSB, that will enable the effective implementation of digital transformation in their respective organizations.
- **Review and propose improvements to the NSB digital transformation maturity self-assessment form** developed by COPANT.

4. Activities

The following activities are proposed for the development of the digital transformation consultancy:

- Organize a virtual, synchronous, joint **awareness event** for COPANT members on the meaning and importance of digital transformation highlighting its benefits for services and the standardization process (approximately 3 hours duration).
- Design and deliver synchronous, joint, virtual **training modules** for key personnel designated by COPANT member NSBs that address crucial topics related to digital transformation, among which the following are considered:
Defining Objectives, Stakeholder Engagement, Technology Selection, Training and Skills Development, Change Management, Cyber Security, Evaluation and Measurement, Iteration and Continuous Improvement, Compliance with Standards, Budget and Resources, Effective Communication, Project Management, Senior Management Support (Approximately 34 hours in length).
- Design and deliver virtual, synchronous, joint **training modules aimed at NSB top management** to provide them with tools to initiate and sustain a digital transformation process within each autonomous NSB. (Approximately 9 hours in duration).
- **Review and propose improvements to the NSB digital transformation maturity self-assessment form** developed by COPANT.

Proposed training modules (does not constitute a limitation to these topics, and may be improved, adjusted or expanded as needed).

Module	Contents	Estimated Duration	Practical Sessions and Interactive Exercises
Module 1: Introduction to Digital Transformation	<ul style="list-style-type: none"> - Understanding the meaning and importance of digital transformation in the current context. - Current status of the standardization body in relation to digital transformation. - Integration of digital transformation in the NSB strategy. 	3 hours	<ul style="list-style-type: none"> - Analysis of the current situation of NSB. - Interactive debate on the importance of digital transformation. - Analysis of NSB's Strategic Planning and how to incorporate digital transformation.
Module 2: Definition of Objectives	<ul style="list-style-type: none"> - Establishment of measurable objectives aligned with the NSB strategy. - Measuring and monitoring progress. 	2 hours	<ul style="list-style-type: none"> - Establishment of specific objectives for the NSB. - Establishment of tools for measuring progress.
Module 3: Stakeholder Engagement	<ul style="list-style-type: none"> - Importance of the involvement of all internal and external stakeholders. - Identification and commitment of all stakeholders. - Engagement strategies. - Use of digital media in customer relations. 	3 hours	<ul style="list-style-type: none"> - Stakeholder interaction simulation. - Design of engagement strategies.
Module 4: Selection of Appropriate Technologies	<ul style="list-style-type: none"> - Evaluation of existing digital technologies and tools that can be applied to standardization processes. - Criteria for choosing appropriate digital technologies and tools. - Integration and scalability of solutions. 	3 hours	<ul style="list-style-type: none"> - Analysis of current technologies used by the NSB. - Analysis of tools designed by ISO and IEC. - Discussion on the integration of new technologies with existing systems.
Module 5: Training, Skills and Talent Development	<ul style="list-style-type: none"> - Identification of NSB staff capacity building needs. - Design and implementation of training programs. 	3 hours	<ul style="list-style-type: none"> - Training exercises in digital tools. - Development of practical skills.
Module 6: Change Management	<ul style="list-style-type: none"> - Addressing cultural and organizational change oriented towards digital transformation. - Flexibility and adaptability of personnel. - Integration of digital transformation in the strategy and organizational culture. 	3 hours	<ul style="list-style-type: none"> - Simulation of cultural change. - Design of change management strategies.
Module 7: Cyber Security	<ul style="list-style-type: none"> - Importance of information security. - Data and systems protection. - Compliance with regulations and standards in the digital environment. 	3 hours	<ul style="list-style-type: none"> - Risk assessment and security measures. - Analysis of standard requirements - Development of compliance strategies.

Module	Contents	Estimated Duration	Practical Sessions and Interactive Exercises
Module 8: Evaluation and Measurement	<ul style="list-style-type: none"> - Establishment of metrics and KPIs to measure the progress and impact of the transformation. - Measuring the impact of the transformation. - Tracking progress. 	3 hours	<ul style="list-style-type: none"> - Development of tracking metrics. - Simulation of progress and impact measurement. - Analysis of results.
Module 9: Iteration and Continuous Improvement	<ul style="list-style-type: none"> - Continuous improvement process in digital transformation. - Focus on the constant evolution of digital transformation. - Transformation of products and services for their digitalization. - Implementation of digital tools for the dissemination of standards. 	3 hours	<ul style="list-style-type: none"> - Identification of areas for improvement. - Improvement of internal processes. - Identify products and services that can be digitized in the NSB.
Module 11: Budget and Resources	<ul style="list-style-type: none"> - Allocation of financial and human resources. - Budget planning. 	2 hours	<ul style="list-style-type: none"> - Costing simulation to digitize processes at NSB.
Module 12: Effective Communication	<ul style="list-style-type: none"> - Internal and external communication strategies to effectively communicate objectives and progress. 	2 hours	<ul style="list-style-type: none"> - Development of communication strategies - Simulation of effective communication of progress.
Module 13: PROJECT MANAGEMENT	<ul style="list-style-type: none"> - Use of project management methodologies to execute the transformation efficiently. 	2 hours	<ul style="list-style-type: none"> -Simulation of project management -Application of methodologies.
Module 14: Senior Management Endorsement	<ul style="list-style-type: none"> - Obtaining the support of senior management for the success of digital transformation. - Importance of leadership. 	2 hours	<ul style="list-style-type: none"> - Strategies to obtain support - Identification of key leaders.

Proposed training modules for Senior Management (does not constitute a limitation to these topics, and may be improved, adjusted or expanded as necessary).

Module	Contents	Duration	Practical Sessions and Interactive Exercises
Senior Management - The WHY: Going beyond digital trends	<ul style="list-style-type: none"> - Introduction and role of senior management in the digital transformation process at NSB. - Impact of digitalization on business models. - Global consumer trends and changes in distribution models. - Rethinking business models. - Go beyond digital trends. - Scenario planning. 	3 hours	<ul style="list-style-type: none"> - Interactive discussion on the impacts of digitalization - Scenario planning exercise. - Analyze areas where innovation and growth can be applied.

Module	Contents	Duration	Practical Sessions and Interactive Exercises
Senior Management - The WHAT: Transforming vision into reality	<ul style="list-style-type: none"> - Elements of the bimodal organization. - Data analysis, artificial intelligence and big data. - Transform the organization from within. - Omnichannel (communication strategy that improves the company-customer relationship through different interrelated channels and allows identifying the customer in the different channels). - Design of a new value proposition. - Corporate intrapreneurship (creating something new that adds value to the company and makes it more successful in the market). 	3 hours	<ul style="list-style-type: none"> - Exercise to design a value proposition - Identifying customers in the different channels
Senior Management - The HOW: Developing a digital mindset	<ul style="list-style-type: none"> - Hypothesis-based experimentation. - Working with a digital mindset. - Cross-functional collaboration. - Consistency and AGILE culture. - Workshop SCRUM (agile methodology project management framework that helps teams structure and manage work through a set of values, principles and practices). 	3 hours	<ul style="list-style-type: none"> - Define strategies to foster a digital mindset in the organization - Define processes in which delivery times can be shortened

The total estimated duration of the entire training program would be approximately 43 hours, distributed in training sessions and practical activities, all virtually.

5. Timeline

The precise schedule will be defined in collaboration with the consulting firm and the participating NSBs, with an estimated duration of 7 months.

The distribution of the schedule may be as follows:

- Organization, development and implementation of the awareness-raising event, during the first month.
- Development and completion of all training modules 4 and a half months.
- Review and improvement of COPANT's digital transformation maturity self-assessment tool, 30 days
- Preparation of final report with recommendations 15 days.



6. Language

The languages required to provide this service are Spanish and English for awareness and training activities. COPANT will provide simultaneous interpretation to facilitate communication when necessary.

7. Technical Proposal:

In this section, we request that your firm or group of consultants detail the planning for carrying out the activities described in section "4. Activities" of these terms of reference. Provide a comprehensive breakdown of each activity, including time allocation and the experts who will be in charge of each task. To support your team's expertise, include resumes or summaries of expertise for each of the experts who will be involved in the execution of the project.

8. Economic Proposal:

The economic proposal must be directly related to the four items specified in item 4 of the terms of reference, which detail the required activities. Please consider the number of modules, hours and experts required, as described in the technical proposal. Provide a clear and detailed breakdown of the costs associated with each activity, making sure to provide a complete picture of the cost structure of the project. This information will be essential for the evaluation and comparison of the economic proposals received.

9. Evaluation and Selection

The selection of the consulting firm will be based on its experience in digital transformation, the quality of the proposed training modules, the work methodology, and its track record in similar projects for National Standardization Bodies (NSB). The comprehensiveness of their technical proposal and their economic proposal will also be evaluated.

10. Contact

For further inquiries, please contact the COPANT Secretariat via email: copant@copant.org or via Whatsapp: +502 39997931.

11. Deadline for Submission of Proposals

Proposals should be submitted by January 31, 2024 to copant@copant.org.

Proposers' inquiries will be entertained, upon request, from January 8 through January 19, 2024.