

## DIGITAL TRANSFORMATION OF A TRADE ENTERPRISE AS AN INNOVATIVE PROJECT: ESSENCE, METHODOLOGY, AND IMPLEMENTATION PRACTICE

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In the context of accelerating technological progress and rising consumer expectations, digital transformation is becoming an integral part of the strategic development of trade enterprises. The modern consumer increasingly selects goods and places orders through digital channels, expects instant responses to inquiries regardless of the time of day, and seeks convenient remote service. Enterprises that fail to meet these expectations gradually lose their competitive positions, even if the quality of their products and service in traditional sales channels is high.

The issues of innovative development of enterprises have been studied in the works of domestic scholars, including Ilyashenko S.M., Lepeyko T.I., and Hontareva I.V. Questions of digital transformation of trade enterprises are covered in the research of Kane G.C., Mazarakii A.A., Androshchuk G.O., as well as in reports by international organizations, including the McKinsey Global Institute and MIT Sloan Management Review. At the same time, the methodology for substantiating and implementing digitalization projects for small and medium-sized businesses in the trade sector, under contemporary domestic realities, remains insufficiently developed.

The purpose of the article is to reveal the essence of the digital transformation of a trade enterprise as an innovative project, characterize methodological approaches to its analysis, and highlight the implementation practice using the example of a food retail enterprise.

Digital transformation of an enterprise is a systemic implementation of digital technologies into key business processes to increase competitiveness, expand sales channels, and improve customer experience. Unlike partial automation of individual operations, digital transformation involves a comprehensive change in the model of enterprise interaction with customers, suppliers, and its own personnel. According to the classification of the Organisation for Economic Co-operation and Development (OECD), such changes can simultaneously cover several types of innovations: process (new methods of order processing and communications), marketing (new sales and promotion channels), and organizational (new tools for management analytics) [1].

For small and medium-sized trade enterprises, digital transformation acquires special relevance in two dimensions. Firstly, it is a response to changes in consumer behavior, as they expect goods and services to be available online. Secondly, it is a reaction to the shortage of human resources and the need to increase operational efficiency without a proportional increase in personnel [2]. Under martial law, these factors are intensified: power outages and limited population mobility increase the demand for remote service channels, while the cloud nature of modern digital solutions ensures their uninterrupted operation regardless of the situation at the enterprise office.

Effective substantiation of a digital transformation project requires the application of a system of complementary analytical methods [3]. The author proposes a sequence of seven steps, where each subsequent one deepens and specifies the conclusions of the previous one. The first step is a PESTL analysis of the external macro-environment, identifying external opportunities and threats for digital initiatives. The second step is a SWOT analysis, combining the external assessment with an analysis of the internal potential of the enterprise. The third step is an assessment of the level of innovative activity by key components, identifying "blind spots" or areas where digital activity is critically absent. The fourth step is the problem field method, systematizing identified shortcomings by symptoms, consequences, and resolution priority. The fifth step is the "5 Whys" method developed by Sakichi Toyoda [4], establishing the root causes of critical problems and thus guaranteeing the systemic nature of the proposed solutions. The sixth step is a comparative analysis of digital maturity, specifying the lag or leadership of the enterprise relative to competitors. The seventh step is a quantitative assessment of losses from the lack of innovation, monetizing identified problems and turning qualitative arguments into a specific financial justification for the need for investment.

It is fundamentally important that each method is justified before application, rather than introduced post factum after obtaining results. This approach ensures the logical sequence and academic rigor of the analysis.

The practical implementation of the described methodology using the example of a food retail enterprise allowed for the formulation of a concept for an innovative digital transformation project covering two complementary solutions.

The first solution concerns the automation of customer communications: the implementation of a ready-made SaaS platform for automated processing of typical incoming and outgoing phone inquiries (availability and price of goods, order status, current promotions, order confirmations, primary routing of non-standard requests). The key advantage of this approach is the 24/7 availability of the service without involving personnel for routine tasks.

The second solution concerns the expansion of sales channels: the development of a corporate website with an online store, a built-in chatbot for instant responses to visitor requests, and an analytical dashboard for managers reflecting visit statistics, customer behavior, order dynamics, and the effectiveness of marketing campaigns in real-time.

The synergy of the two solutions is a fundamental element of the concept. Both channels, both telephone and online, use a common knowledge base synchronized with the enterprise's accounting system. This means that the client receives the same up-to-date information regardless of whether they call or reach out via chat on the site. The analytical dashboard generalizes data from both channels, providing managers with a holistic picture of customer interaction and demand for making informed management decisions.

The strategic value of such a project goes beyond immediate operational improvements [5,6]. Firstly, going online forms the digital presence of the enterprise in search engines, which is the foundation for further organic attraction of new customers. Secondly, automation of routine communications frees up staff time for higher-complexity tasks and work with key clients. Thirdly, the scalability of both solutions means that as the retail network grows, the operating costs for maintaining the system increase insignificantly, while the volume of processed requests and online orders increases proportionally with business expansion.

An important component of the concept is taking into account the specifics of martial law. The cloud deployment of both solutions ensures their uninterrupted operation; even during long power outages at the enterprise office, the site and the automated system continue to accept requests and orders. Backup equipment for local components and a mobile internet channel eliminate dependence on the stability of external infrastructure.

The proposed approach to the development and justification of digital transformation projects for trade enterprises is of a generalized nature and can be applied by other food retail enterprises at the initial stage of digitalization. The methodology of consistent application of seven analytical methods from PESTL-analysis to the quantitative assessment of losses allows any enterprise to move from an abstract awareness of the need for change to a specific, financially justified innovative project. The strategy of ready-made SaaS solutions, meanwhile, significantly lowers the barrier to entry, making digital transformation accessible without significant capital investments and the involvement of large development teams.

Thus, the digital transformation of a trade enterprise is a full-fledged innovative project that requires a systemic approach to justification, planning, and implementation. The combination of automated communications and an online sales channel with analytical tools for managers forms a single digital ecosystem of the enterprise, capable of scaling along with business growth and generating a sustainable competitive advantage in the conditions of the post-war recovery of Ukraine.

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