What You and Your Client Will Accomplish

You and your client discovered gaps and opportunities during your technical maturing and tech savviness sessions. All of this will quickly become overwhelming. Where to begin? There's too much so let's just not do anything. That's to be expected. Before everyone goes back to what's comfortable, you're going to organize and prioritize what you've learned. Your clients will see the value in these discovery exercises when the action items take shape.

Tips for Getting Started with Results

☑ Here's a template to guide your planning. Based on what you've learned and your client's attitude about expanding their technical knowledge, feel free to modify this to meet your needs. The goal is to organize this into a working document that everyone feels comfortable using.

☑ Start with the immediate gaps that create risk for your client. Focus on the steps to fill the gaps so your client quickly sees the outcome. Remember, this is for their company's benefit so focus on this instead of the technical aspects that can feel intimidating and expensive.

☑ It can be tempting to skip or remove completely columns that require uncomfortable conversation. For example, what skills are required or who will be responsible. When your client is unsure – or knows – they don't have the right folks to get the work done, the natural response is "we'll figure it out later." Nope. Later means it won't happen.

☑ Help them become more confident in outsourcing to the right partner. And by the way, this might be outside your scope of services too. Who will you partner with to deliver the right services for your client?

- ☑ Prioritizing each project will keep everyone focused on the right thing. It's easy to let the urgent, foundational things take a backseat to the shiny new ideas.

  1=Urgent, broken, high risk
  2=Impacts business, some risk
  3=Nice to have, little or no risk

- ☑ Don't get buried in the time to complete and costs until all the projects have been added to the doc. Then come back and go deeper into each project's details.

- ☑ As you layout these projects, continue to emphasize the results, not the complexity or costs. Obviously, costs matter but avoid the it's-too-expensive objections until the entire project has been outlined. Then measure the costs against the expected results.

- ☑ The more quickly your client realizes measurable outcomes the more willing they will be to tackle longer term strategic projects.

- ☑ Make this template your own. As you work with each client, you'll think of points that need to be remembered, discussed, and included in the plan. The best place to add these is in the doc you're working on.

Let's get started.

Project Name: ____

Points to Consider	The Details
How important is this (1,2,3)	
What are the impacts if we don't do this?	
Who, what other business processes or services will be impacted by doing this?	
What concerns does the company owner/leader have in doing this?	
What needs to be fixed? Be specific to uncover any hidden impacts.	
What skills are required to complete?	
Who will be assigned to the project?	
What skills will be outsourced?	
How involved does the owner/leader want to be?	
Who will be responsible for completing, managing the plan?	
What additional tools will be needed?	
How long with this take to complete?	
What are the costs?	
What is the expected outcome? Be specific. The result should be measurable.	

A Friendly Reminder