

1. Plan

What's the problem?

What's a vexing issue that you or your company need to fix?

Problem Statement

What's the business objective you will meet?

This should be an established corporate / personal objective.

Objective

How are you going to address it?

This should be your vision.

Idea

Hypothesis

If we _____ then _____ will happen.

2. Why

What's it worth to you?

List the risks resolved by your initiative.

Determine the downside risk avoidance

3 Year Risk Matrix

	Negligible	Marginal	Critical	Catastrophic
Certain				
Likely				
Possible				
Unlikely				
Rare				

List the benefits.

Calculate return on investment

Sell the project on upside / benefits based on an insurance budget.

Budget Range _____

3. Supporting Information

Build conviction:

Online Survey

Test your idea:

Expert opinions

Evidence suggests

4. Do It Right

Fix your work flow

Please circle one.

Faster or slower?

More or less intuitive?

More or fewer steps?

More or less satisfying?

More or fewer hand-offs

Eliminate single point of failure? Yes / No

More or less risk?

Opens new opportunities? Yes / No

The new work flow will _____

5. Stakeholders

Identify stakeholder + challengers

	Name	Role	What's in it for them?
Champion			
Collaborators			
Users			
Challengers			

Next Steps

1. Review this worksheet and fill in obvious gaps.
2. Talk to three relevant people about it casually: "I went through an exercise..."
Ask three questions:
 - Does this seem plausible?
 - Are we measuring the right things or am I missing something?
 - What would you change?
3. Iterate, advancing the content and your contacts each time.
4. Implement your plan.
Engage with IT, product companies, or a services company to get started.