

Action plan



Assess whether your technology will support business growth

Constantly changing your apps, tools and working processes is easy to do when you're small, but as the business grows, it pays to consolidate tools and get a more holistic view of sales and products.

Basic solutions like spreadsheets can become cumbersome, and leaders need to recognise when a step change towards more robust technology is necessary. Get the right set of products and services and they can be used across the workforce, streamlining operations and enabling growth.

- **Effort:** Medium
- **Impact:** High

Actions:

Run a SWOT analysis of your current tools and processes to establish what's working well and what could be improved.

- **Impact:** High
- **Suggested duration:** 30 days
- **Why this will help:** Look at the strengths, weaknesses, opportunities and threats for key tools within the business. While this can be time consuming, it will provide a clear picture of how to move forward and allow you to recognise where technology no longer works for the size or ambition of your business.

Talk to peers about the technology products and services that work best for their businesses. Ask them to recommend and demonstrate their chosen tech so you can see it in action.

- **Impact:** Medium
- **Suggested duration:** 10 days
- **Why this will help:** An external perspective can highlight areas for improvement that you might have missed. Seeing different solutions in real time also gives you a clearer picture of how they work than you would get from running a demo on your own.

Speak to employees from each team in the business to learn more about the benefits and drawbacks of current systems, and take suggestions for improvements.

- **Impact:** Medium
- **Suggested duration:** 12 days
- **Why this will help:** It's important to make sure any new solutions will meet the needs of as many different parts of the business as possible. Avoid implementing technology that would work well for one team but be ill-fitting for another, or you could end up with multiple tools that don't integrate with one another.

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Using feedback from peers and employees, explore alternative options that would support growth and be flexibly integrated with other systems in your business.

- **Impact:** Medium
- **Suggested duration:** 15 days
- **Why this will help:** Finding tools that are easily integrated will help to make your processes more streamlined. Resist the temptation to simply “bolt on” new tools when you need them, or you could end up with a clunky, unwieldy system.

Assess whether new technology would better support business growth or whether you should stick with existing tools.

- **Impact:** High
- **Suggested duration:** 10 days
- **Why this will help:** Review the technology available and make a decision about what will best support your business. Remember to factor in what your business will need in a year’s time, not just what you need now.

How will I know if my action plan is working?

Way to measure success

Defined requirements for technology

Why this metric?:

Business leaders should have a clearer idea of what they want from technology.

How do I start tracking?:

Review requirements every six months, reflecting on whether your needs have changed during this time.