

Before You Plug It In

10 Questions to Ask Before Adding or Changing Technology in Your Business

In Practice | **Connie StClair, Business Advisor**

Technology might be plug and play, but operations are not.

A new phone system, scheduling tool, or software application may be easy to purchase and install. But even a simple change can affect how people work, how information moves, and how the business operates.

Before you make the purchase, take a little time to think through what the change might touch. These ten questions can help you start the right conversations.

Before you decide

1. What problem are we trying to solve?

Be specific. Are we trying to save time, reduce mistakes, improve service, increase capacity, or solve something else?

2. What would a successful outcome look like?

How will we know the change actually improved something? What should be different once it's working?

3. How does the work happen today?

Who does the work, what steps are involved, and where are the frustrations? Talk with the people who know the daily operation.

Before you implement

4. What will this technology change?

Think beyond the new tool. Which responsibilities, routines, handoffs, or decisions might need to change with it?

5. What other systems or information will it touch?

Will it connect with existing software, calendars, customer records, or reporting? What information moves between systems, and what doesn't?

6. What decisions need to be made, and by whom?

Who needs to help shape the approach? Who can make decisions, and who needs to approve them?

7. What happens when things don't work as expected?

Consider exceptions, interruptions, and situations the standard setup may not handle. Who will recognize a problem, and what will they do?

8. What will this cost beyond the purchase price?

Consider training, staff time, changes to workflows, ongoing support, and the time needed to get things working well.

Before you call it finished

9. What do people need to know, learn, or agree on?

What needs to be explained, practiced, or decided together so everyone understands how the new system fits into their work?

10. Who will maintain it, and where will we document how it works?

Who will manage changes, keep account information accessible, and record important settings and decisions for future reference?

One last thought

You don't need every answer before you begin. But you do need to recognize which questions deserve a conversation.

One idea can lead to a hundred decisions. The earlier you recognize them, the better prepared you'll be to move forward.

This guide is a preparation tool. It supports the conversation. It doesn't replace it.

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Clearing the Path Forward

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