

01 / DEFINE THE WORK

Find one workflow worth improving.

A workflow map and a practical pilot plan.

Work in general terms. Leave out passwords, private records and candidate details.

01 What task would you like to improve?

For example: turn volunteer inquiries into a clear follow-up list.

02 What happens today?

Write the trigger, the main steps and where the work ends.

03 What would better look like?

A useful outcome: fewer missed requests, faster handoffs or less retyping.

04 How consistent is the task?

Consider: Mostly the same steps; A mix of routine and judgment; Different almost every time.

05 What information does it use?

Consider: Public or made-up information; Internal business information; Personal or sensitive records; I'm not sure.

01 / PLAN THE NEXT STEP

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06 What if a result is wrong?

Consider: Someone can easily fix it before use; It could affect a customer or commitment; It could cause serious harm or a regulated decision.

07 Who checks the result?

A role is enough, such as the operations lead. What do they check?

08 What will you compare before and after?

Include review time, mistakes and the quality of the result.

09 When would you pause the test?

For example: missing requests, unclear consent or more work for the reviewer.

A USEFUL NEXT STEP

Start with made-up inputs. Compare total effort, errors and quality. Keep a person responsible for every result.

02 / DEFINE THE WORK

Support, refresh or rebuild?

A website decision brief and the evidence to gather next.

Work in general terms. Leave out passwords, private records and candidate details.

01 What should visitors be able to do?

For example: request a quote, book a visit or become a member.

02 What is the main frustration?

Consider: Support is slow or unreliable; The message or design feels out of date; The platform limits what we need; The site is broken or may be compromised; We need to understand the problem first.

03 What is the website built on?

WordPress, Squarespace, a custom app, or simply 'not sure'.

04 Do you control the domain, hosting and admin accounts?

Consider: Yes, and we can verify access; Some, but not all; No or not sure.

05 Can you restore a working backup?

Consider: Yes, recovery has been tested; Backups exist but recovery is untested; No or not sure.

02 / PLAN THE NEXT STEP

Support, refresh or rebuild?

A website decision brief and the evidence to gather next.

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06 Does the current platform support the work you need?

Consider: Yes, the basic functions work; Mostly, with some friction; No, essential functions are missing; Not sure.

07 What must keep working?

High-value pages, forms, donations, search traffic, integrations or member access.

08 What constraints should a partner understand?

Budget, deadlines, staff capacity or a system you must keep. 'To discuss' is fine.

09 How will you know the change helped?

For example: qualified inquiries arrive reliably and staff can update key pages.

A USEFUL NEXT STEP

Confirm ownership and recovery first. Compare support, a focused refresh and a rebuild before committing to a scope.

03 / DEFINE THE WORK

Define the role before the search.

An IT hiring brief you can review with your team or a staffing partner.

Work in general terms. Leave out passwords, private records and candidate details.

01 What role or capability do you need?

A working title is fine. Describe the gap if the title is unclear.

02 What should this person accomplish in the first 90 days?

Two or three concrete outcomes, with room to learn the environment.

03 Which skills are genuinely essential?

List up to three capabilities needed to perform the work.

04 What kind of engagement are you considering?

Consider: Contract; Contract-to-hire; Interim leadership; Help us determine the right approach.

05 Where and when does the work happen?

Remote, on-site or hybrid; location, time-zone overlap and travel expectations.

03 / PLAN THE NEXT STEP

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06 Who supports this person and makes decisions?

Reporting line, team resources and decision authority.

07 What budget or rate range is approved?

Include whether it is a pay or bill-rate range and the currency. 'To confirm' is fine.

08 What is the timing and expected duration?

Desired start, assignment length and any approval still needed.

09 How will you assess the essential skills?

Job-related interview topics, a practical discussion and who makes the decision.

A USEFUL NEXT STEP

Review outcomes, essential skills, working conditions and budget with the decision maker before sourcing.

04 / DEFINE THE WORK

Give your app idea a useful first version.

A product brief with a first test, release boundaries and operating needs.

Work in general terms. Leave out passwords, private records and candidate details.

01 Where are you starting?

Consider: A new product idea; An internal tool we need; An existing app that needs support or improvement.

02 Who is it for, and what are they trying to do?

For example: volunteer coordinators assigning the right person to each event.

03 What have you learned from those people?

Current workarounds, observed problems or conversations still needed.

04 What one journey must work from start to finish?

Describe the trigger, action and useful result.

05 What can wait?

Put tempting features outside the first release explicitly.

04 / PLAN THE NEXT STEP

Give your app idea a useful first version.

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06 Does it require phone-specific capabilities?

Consider: A browser may be enough; We need capabilities such as offline use, camera or notifications; We need to investigate.

07 What data, integrations or access does it depend on?

Name the kinds of systems, not passwords or private records.

08 How will a small group test whether it helps?

Choose an observable result and a way to get feedback.

09 Who owns it after launch, and what constraints matter?

Support, budget, accessibility, security, staff capacity and ongoing maintenance.

A USEFUL NEXT STEP

Test one complete journey with intended users. Confirm ownership, data handling and support before estimating a build.