



STEP 1: STRATEGY & GOALS

- Clearly articulate where you are trying to go in business – not technical – terms
- ask stakeholders the “What’s the point?” in plain terms

STEP 2: BUSINESS OBJECTIVES & INITIATIVES

- Identify specific business objectives that support the strategy and goals and focus on the behaviors you want to encourage, the decisions that need to be made, or the answer that needs to be provided. Start at your Finish – know what you’ll need to get out of the system.
- Avoid jumping straight to “What fields / values / columns do you want?” and, instead, ask questions that focus on the end result such as “What action do you want to be able to take?” or “What decision do you want to be able to make?” or “What are you going to do with this information?”

STEP 3: SOLUTION STORIES

- Describe what success looks like through stories and use cases
- Consider the points of view of each segment of your audience or group of stakeholders

STEP 4: BUSINESS & TECHNICAL REQUIREMENTS

- Identify what information is needed from a business perspective and enlist subject matter experts to define technical requirements
- Be sure the requirements incorporate all three components of a complete solution—people, process AND technology

STEP 5: EVALUATION & SELECTION

- Share your vision with the vendors or service providers so they understand the “big picture” and your priorities
- Focus demonstrations on your specific goals, objectives, use cases and requirements and ask questions
- Remember that everything should “demo” well in a controlled environment—do your homework by checking references AND tapping into your personal network to find out what it does in reality

STEP 6: IMPLEMENTATION

- Evaluate scope changes against the strategy, goals and objectives. If a change is consistent with the strategy, goals and objectives, go for it! If the change isn’t consistent, either reject it *OR* change your plan. Either way, it should be a conscious, deliberate decision.
- Leverage the work you already put into the strategy, goals and objectives as the foundation of your communication strategy