EXECUTIVE ASSESSMENT

Before You Invest: Seven Questions for a Technology Decision

Use this before the decision, not after it. Each movement asks one question, states what the movement has to establish, and identifies what to record. If a movement cannot be answered yet, that gap is the next piece of work.

Work through the movements in order. An answer that cannot be written down plainly is usually a decision that has not been made.

01 OUTCOME

What must become materially different?

Define the business result, the people it serves, and the evidence that will show the investment mattered.

RECORD

The business consequence that must become different, and the evidence that will show it changed.

REVIEW QUESTION

Which business outcome is important enough to govern this investment?

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02 DIAGNOSE

What is true, and what is only assumed?

Map the current workflow, systems, ownership, constraints, economics, and evidence before prescribing change.

RECORD

What the diagnosis shows underneath the presenting complaint.

REVIEW QUESTION

What does the end-to-end work look like across people and systems today?

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03 DESIGN

What operating model will produce the outcome?

Shape process, decision rights, people, data, architecture, platforms, and controls as one system.

RECORD

The operating model that produces the outcome, including who holds which decision rights.

REVIEW QUESTION

Is the constraint process, ownership, data, capability, configuration, or technology?

04 DECIDE

What will be configured, integrated, automated, built, retired, or left alone?

Make sequence, ownership, risk, and investment explicit so the organization does not default to buying or building its way around an operating problem.

RECORD

What will be configured, integrated, automated, built, retired, or deliberately left alone.

REVIEW QUESTION

Which incumbent system should remain authoritative?

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05 EXECUTE

How will the work stay accountable?

Apply PACE to turn the decisions into visible delivery rhythms and usable operating practices.

RECORD

The delivery sequence that reduces risk before wider adoption.

REVIEW QUESTION

What should be configured, integrated, automated, built, retired, or left alone?

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06 TRANSFER

Who can operate this without the advisor?

Build internal capability, decision rights, documentation, and leadership habits so the investment creates independence rather than dependency.

RECORD

The capability that must remain with the organization afterward.

REVIEW QUESTION

Who owns the operating change after the technology ships?

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07 MEASURE

Did operating capacity actually change?

Evaluate adoption, economics, quality, risk, capacity, and business performance. Feed what the organization learns into the next decision cycle.

RECORD

The measure that will say whether to continue, change course, or stop.

REVIEW QUESTION

Which measure will tell us to continue, change course, or stop?

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