Tech Transpire
Clarity. Alignment. Execution



THE TECH TRANSPIRE PLAYBOOK

Solve the right problem.
Clarity before change.

How to find out whether your business is fixing the wrong thing, and what to do about it in the next 30 days.

5 steps · 5 printable worksheets · one 30-day plan
For owners and operators of growing businesses

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START HERE

How to use this playbook

This playbook is for owners and leaders who have put time, money and people into a change, a new system, a fix or a project, and are no longer sure it is the right one.

Who it is for

Owners, operators and managers of growing businesses with lean teams and budgets. It works whether the problem is an order process, systems that don't talk to each other, a tool everyone works around, or a project that keeps slipping.

How long it takes

- **20 minutes** to read it on your own.
- **90 minutes** to work through the worksheets with the people who decide and the people who do the work.
- **30 days** to prove one fix before you commit more budget.

What you need

- A printed copy of the five worksheets.
- The person accountable for the result.
- Whoever decides on budget and priority.
- Two or three people who do the work every day.

You don't need to stop what you're doing. You need one honest conversation about what the work is actually for.

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THE PATTERN

Good teams. Wrong problem.

Most projects that disappoint are not failures of effort. The team was capable, the budget was reasonable and the vendor knew their tools. The work was built on the wrong understanding of the problem, so everything delivered afterwards was aimed at the wrong target.

Pressure doesn't fix this. Asking people to work harder on a plan that was never correctly defined only produces the wrong result sooner. Neither does buying more software: a new system automates whatever process it is given, including the confusion.

Three statements usually mark the pattern. Each one names a solution or a culprit. None of them names the problem.

WHAT WE HEAR	WHAT IS USUALLY HAPPENING
"We need a new system."	A process isn't understood end to end. The new system will inherit the confusion, and cost more to change later.
"Our software isn't working."	The technology is rarely the root cause. Nobody was clear on what the software needed to do, or who owned it.
"The team isn't executing."	The plan itself is wrong. No team executes a wrong plan well.

The principle behind this playbook: clarity before change. Get clear on the problem before you commit to the solution. Solving the wrong problem perfectly is still a failure, and the five steps that follow exist to catch it before more is spent.

The five steps at a glance

STEP	QUESTION IT ANSWERS	OUTPUT
1 · Name it	What is actually wrong, for whom?	One problem sentence
2 · Map it	Where does the work break?	Two weak handoffs
3 · Price it	What does it cost us today?	A yearly cost estimate
4 · Align on it	Do the people who decide agree?	One measure, one owner
5 · Fix it lightly	What is the smallest fix that will hold?	A 30-day first move

SELF-CHECK

Seven signs you're fixing the wrong thing

Tick each statement that is true of your project, system or problem today.

- [ ] Everyone is busy, but people describe the goal differently.
- [ ] The project is named after a tool or a vendor, not after a result ("the CRM project", "the ERP upgrade").
- [ ] Deadlines keep slipping, and each new date is explained by a new cause.
- [ ] Costs have gone up, and nobody can say what the business gets for the extra spend.
- [ ] The people who do the work every day were never asked what the problem is.
- [ ] Nobody can say, in one sentence, what will be measurably different when it's done.
- [ ] Problems show up where work passes from one person, team or system to another, and nobody owns them.

Reading your score

TICKS	WHAT IT MEANS	WHAT TO DO
0 to 2	The problem and the plan are probably aligned.	Use Steps 3 and 5 to check you've chosen the lightest fix.
3 to 4	The plan deserves a second look before the next milestone or payment.	Work through Steps 1 to 4 this month.
5 or more	There's a real chance you're solving the wrong problem.	Pause new spend and start at Step 1 this week.

A PATTERN WE SEE OFTEN

One client relied on a stock-tracking tool that had been broken for over a year and a half. Everyone knew. Everyone worked around it. When we looked at it, the fix took hours.

That's not a technology story. It's an ownership story: the most expensive problems in growing businesses usually aren't hard. They're unowned.

STEP 1 · CLARITY

01 Name the problem before the plan

A plan answers "how". Before that question is worth asking, the team needs one shared answer to "what is wrong, for whom, and what does it cost us".

Write the problem as one sentence with no system, vendor or method in it:

> **[Who]** cannot **[do what]** because **[cause]**, and the result is **[cost or consequence]**.

Example: "Our sales team cannot follow up on every quote because quotes live in email and the CRM doesn't see them, and the result is lost orders we only discover at month end."

Two tests for your sentence

1. **The removal test.** If your current project delivered everything in its scope, would this sentence stop being true? If the honest answer is "partly" or "not sure", the plan and the problem have drifted apart.
2. **The front-line test.** Read the sentence to three people who live with the problem. If they correct you, their version is the better one.

Common mistakes

INSTEAD OF…	WRITE…
"We need a new inventory system."	"Our warehouse team can't trust stock counts because receipts are logged a day late, so we over-order and run out."
"Reporting is a mess."	"The owner can't see weekly margin because job costs sit in three spreadsheets, so pricing decisions wait until quarter end."
"Onboarding takes too long."	"New customers wait 9 days to go live because setup needs four people and nobody tracks who's next." (use your real number)

Facilitator tip: if the room can't agree on one sentence in 20 minutes, that disagreement *is* the finding. Write down every version and take them into Step 4.

WORKSHEET 1 · STEP 1

Name the problem

Fill this in together. Write in plain words; leave technology names out of the problem sentence.

PROMPT	YOUR ANSWER
The project or initiative as it is described today	
The problem in one sentence, with no technology named [Who] cannot [do what] because [cause], and the result is [cost].	
Who feels it most, and how often	
What it costs: time, money, customers or risk	
Removal test: would the current plan make the sentence untrue? Yes / Partly / No	
What three front-line people said when they heard the sentence	
Our agreed sentence (final)	

STEP 2 · CLARITY

02 Look at the handoffs, not the steps

Most improvement work studies the steps of a process. The costly problems usually sit between the steps, at the handoffs, where work passes from one person, team or system to another.

Three things go wrong at a handoff

- **Assumptions pile up.** The sender assumes the receiver knows what they're getting. When that's wrong, the error travels downstream unnoticed.
- **Ownership goes missing.** Between step A and step B nobody owns the outcome, so problems surface only when a customer feels them.
- **There's no recovery path.** Steps have procedures. Handoffs rarely do, so a bad transfer is handled by firefighting.

How to map them

1. Take the problem sentence from Step 1 and walk the work from the first trigger (an order, a request, a quote) to the final result.
2. List every handoff, not every task. Five to eight is typical for one process.
3. Include handoffs between systems: a spreadsheet exported to another tool, an email that becomes a job, data re-typed from one screen into another.
4. For each handoff, ask the receiver: "What do you usually have to fix or chase when this arrives?"

Where software comes in. Handoffs between systems are where growing businesses lose the most time: double entry, copy-paste, exports nobody trusts. Many of these can be fixed by connecting tools you already own, without replacing anything. Keep a note of them for Step 5.

What good looks like

By the end of this step you have a list of handoffs and two circled: the two with no owner or no recovery path. Those are where to look first, and they are often outside the scope of the current plan.

WORKSHEET 2 · STEP 2

Map the handoffs

One row per handoff. Circle the two with no owner or no recovery path.

#	FROM	TO	WHAT IS PASSED	WHAT THE SENDER ASSUMES	WHO OWNS IT IN BETWEEN	WHAT HAPPENS WHEN IT GOES WRONG
1						
2						
3						
4						
5						
6						
7						
8						

Circled handoff A

Circled handoff B

03

STEP 3 · CLARITY

Put a price on the problem

Problems that stay unpriced stay unfixed. The cost of a broken process is usually spread across many people in small amounts, so it never shows up as one line on a report.

You don't need precise numbers. You need a defensible estimate that everyone in the room accepts as "about right". Add up four kinds of cost:

COST TYPE	HOW TO ESTIMATE IT
Time	People × hours per week spent on workarounds, re-work or chasing × loaded hourly cost × working weeks per year.
Errors	Number of errors per month × average cost to fix each one (credits, re-shipping, write-offs) × 12.
Lost revenue	Orders, quotes or customers lost or delayed per month × average value × 12. Use only what you can point to.
Risk	Exposure you carry: a compliance miss, a single person who "knows how it works", data you can't recover. Describe it; don't force a number.

Time cost per year = people × hours per week × hourly cost × working weeks

Illustration only: 3 people × 5 hours a week × $40 an hour × 48 weeks = **$28,800 a year**, before counting a single error or lost order. Use your own figures.

Why this step matters

- It tells you how much a fix is worth, so you don't overspend on a small problem or underspend on a big one.
- It turns "annoying" into "costly", which is what gets a problem an owner.
- It gives you the baseline you'll measure the 30-day fix against.

Rule of thumb: if a fix costs less than a year of the problem, and you can prove it in 30 days, it is usually worth trying.

WORKSHEET 3 · STEP 3

Price the problem

Use estimates the room agrees are "about right". Write down where each number came from.

COST	INPUTS	PER YEAR	SOURCE OF THE NUMBERS
Time people × hrs/week × $/hr × weeks			
Errors errors/month × cost each × 12			
Lost or delayed revenue count/month × value × 12			
Risk describe, no number needed			
Total yearly cost			

BASELINE FOR THE FIX	VALUE TODAY
The one number that best shows the problem (e.g. hours of re-work a week, days to fulfil an order, errors a month)	

STEP 4 · ALIGNMENT

04 Get one answer from the people who decide

Teams that work hard in different directions cost more than teams that work slowly in one. Alignment that arrives after the build is rework.

How to run it

1. Ask each decision-maker the four questions on Worksheet 4 **separately and in writing**, before they compare notes. In a small business this might be just the owner, the operations lead and the person who manages the money.
2. Put the answers side by side.
3. Treat every gap between the columns as an agenda item for your next leadership meeting, not as a mistake by any one person.

Reading the result

IF YOU SEE…	DO THIS
The same answers in every column	You're aligned. Move to Step 5.
Different problems named	Go back to Step 1 together. Don't start new work until one sentence is agreed.
Different measures of success	Agree one measure (from Worksheet 3) and one owner for it.
Different ideas of what's out of scope	Write a short "not doing" list and share it with the team.
No clear final say	Decide that first. Every other gap depends on it.

Why separately? When leaders answer together, the most senior or most confident voice sets the answer and the gaps stay hidden. Written answers surface them in minutes.

WORKSHEET 4 · STEP 4

The alignment check

Each decision-maker answers separately, in writing. Then compare.

QUESTION	LEADER 1	LEADER 2	LEADER 3	LEADER 4
What problem is this solving?				
What will be measurably different when it's done?				
What are we explicitly not doing?				
Who has the final say when priorities conflict?				

AGREED AFTER COMPARING	ANSWER
One measure of success	
One owner for that measure	

STEP 5 · EXECUTION

05 Choose the lightest fix that will hold

With the problem named, the weak handoffs found, the cost known and the leaders aligned, pick the smallest change that would move your number. Prove it for 30 days before you commit the full budget.

The fix ladder: start at the bottom

Work up the ladder and stop at the first rung that can move the measure from Worksheet 3. Each rung up costs more, takes longer and is harder to reverse.

1. **Change the process**
   Agree who owns the handoff, add a checklist, change the order of steps. No technology at all.

2. **Use what you already own**
   Switch on the feature, report or automation your current software already has but nobody set up.

3. **Connect your systems**
   Link the tools you already use so data moves once, automatically, instead of being re-typed or exported.

4. **Automate the handoff**
   Add a small workflow or AI step that routes, checks or fills in the work at the weak handoff.

5. **Build custom**
   Build a tool only when the lower rungs can't move the number, and scope it to the problem sentence.

The cheapest fix is often the one you already own. Many problems that arrive as "we need a new system" can be solved on rungs 1 to 3.

STEP 5 · CONTINUED

What a good first move looks like

A good first move has four properties. If yours is missing one, make it smaller until it has all four.

1. **It targets one of the two handoffs** you circled in Step 2.
2. **It has one named owner**, not a committee.
3. **It has one number** that will show whether it worked, with today's value written down (from Worksheet 3).
4. **It can be reversed** if it doesn't work.

Make it last

Gains fade when they depend on the people who introduced them. Before you start, decide:

- Who inside the business will own the change after day 30.
- Which report, dashboard or weekly check will keep running.
- What you will pause or stop to make room for it.

A change with no owner and no measure drifts back to where it started.

Questions to ask any vendor, including us

ASK	LISTEN FOR
"What problem does this solve, in our words?"	Your problem sentence, not a feature list.
"Which rung of the ladder is this, and why not a lower one?"	A clear reason the lighter options won't hold.
"What will we be able to measure in 30 days?"	One number and a realistic target.
"Who owns it after you leave?"	A named person on your team, and a plan to hand over.

WORKSHEET 5 · STEP 5

The first move

One fix, one owner, one number, 30 days.

PROMPT	YOUR ANSWER
The handoff we will fix first	
Lowest rung that can move the number 1 Process · 2 Use what we own · 3 Connect · 4 Automate · 5 Build	
The change, in one sentence	
Owner (one name)	
The one number we will watch	
Its value today	
The value that would count as success in 30 days	
Who owns it after day 30	
The report or review that keeps running	
What we will pause or stop to make room for this	
How we would reverse it if it doesn't work	

THE PLAN

Your 30-day plan

Four weeks is enough to know whether you're fixing the right thing, without stopping the work already under way. Then 30 more days proves the fix. Fill in an owner for each week before you start.

WEEK	FOCUS	WHAT YOU FINISH	OWNER	DONE
1	**Name it**	Self-check and Worksheet 1: one agreed problem sentence, tested with the front line		☐
2	**Map and price it**	Worksheets 2 and 3: handoffs mapped, two circled, yearly cost estimated, baseline recorded		☐
3	**Align on it**	Worksheet 4: leaders' answers compared, gaps closed, one measure and one owner agreed		☐
4	**Fix it lightly**	Worksheet 5: first move chosen on the lowest rung, owner named, start date set		☐
5–8	**Prove it**	The first move runs for 30 days; the number is checked weekly against the baseline		☐

At the end of week 4, make one of three calls

Continue.
The plan matches the problem. Carry on, with the measure and owner now explicit.

Correct.
The plan is close. Change the scope to include the handoffs you circled.

Stop and redefine.
The plan solves a different problem. Pause new spend and rebuild from the agreed sentence.

Any of the three is a good outcome. The costly outcome is carrying on without knowing which one applies.

FAQ

Questions owners ask

How do I know if we have a problem with the plan or with the work?

Ask three people what problem the project solves. If the answers differ, or name a tool instead of a problem, the plan is the issue. If they match and the work is still late, look at execution.

We're already halfway through. Is it too late to check?

No. The checks in this playbook take hours, not weeks, and run alongside the work. Finding a wrong plan halfway is cheaper than finding it at go-live.

Our vendor says the new system will fix it. Why isn't that enough?

A system automates the process it is given. If the process isn't understood end to end, the system inherits the confusion and makes it harder to change.

Why focus on handoffs instead of the slow steps?

Slow steps are visible, so they get attention. Handoffs have no owner, so errors there travel downstream before anyone sees them. Fixing a handoff often removes delays that looked like slow steps.

We're a small team. Do we really need all five worksheets?

Use them all the first time; they take about 90 minutes together. After that, Worksheets 1 and 5 alone are a good habit for any new request.

Why do early gains fade after a strong start?

Usually because the people who made the change were the only ones who could sustain it, and the reporting stopped when they stepped back. Name an internal owner and keep one measure running.

Who should be in the room?

The person accountable for the result, whoever decides on budget and priority, and two or three people who do the work every day. Leave out anyone who is only there to be kept informed.

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NEXT STEP

Want a second pair of eyes?

You now have a problem sentence, a handoff map, a cost estimate, an alignment check and a first move. Bring your completed worksheets to a 30-minute intro call with Tech Transpire.

We'll tell you plainly whether we think the plan matches the problem, which rung of the ladder we'd start on, and whether you need to buy anything at all.

Book a 30-minute intro call

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ABOUT TECH TRANSPIRE

Tech Transpire brings clarity to complex systems before execution, for mid-sized organizations at high-stakes transformation points. Our Implementation Clarity & Execution Blueprint is a 6–8 week engagement that aligns your business processes, systems and execution plan, and leaves you with a blueprint you can carry forward on your own.

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