BizHealth.ai

BIZGROWTH ACADEMY · SCALING SERIES

COURSE WORKBOOK

The 7-Step Tech Decision

Choose and Implement the Right Technology — Without Wasting Money

70%
of software implementations fail to meet their goals

55%
of CRM implementations never achieve planned results

$2.3T
lost every year globally to failed software projects

YOUR STEP-BY-STEP DECISION FRAMEWORK →

Stop Guessing.
Start Growing.

bizhealth.ai/bizgrowth/scaling/choose-implement-technology

BEFORE YOU START

How to Use This Workbook

Don't just read it. Work through it.

You're about to make a tech decision that will affect your business for the next 2–5 years. This workbook walks you through every step — in plain language, with real exercises you complete using a live decision you're facing right now.

01

Pick a real decision to work on

Open the workbook on a specific technology you're evaluating right now — a new CRM, accounting software, scheduling tool, whatever is on your list. You'll fill in every worksheet with real data, not hypotheticals.

02

Work the steps in order

Each step builds on the one before it. If you skip Step 1 (the business case), Step 4 (the real-world test) won't give you useful information. Do them in sequence the first time through.

03

Write in the workbook

Every step has a workspace section — fill it in. Writing forces clarity. If you can't write a crisp answer to “What problem does this solve?”, you're not ready to buy yet.

04

Use the Master Scorecard at the end

After all 7 steps, the Master Decision Scorecard gives you a single-page summary of your findings. Use it to make — or confidently delay — your final decision.

The Real Question Isn't "Which Tool Should We Buy?"

It's: **"Will this technology make our business measurably better — and are we ready to make it work?"** If you can answer that confidently when you finish this workbook, you're ready to move forward. If you can't, you've saved yourself from a very expensive mistake.

THE 7 STEPS AT A GLANCE

1
Build the Business Case
Define the problem before you shop.

2
Calculate True Cost
Find the real number, not the sticker.

3
Evaluate Fit, Not Features
Match how you actually work.

4
Test with Real Scenarios
Prove it on your own work.

5
Assign Ownership
Name who makes it real.

6
Phase the Rollout
Launch in stages, capture wins.

7
Measure Adoption & Impact
Confirm the business got better.

HOW THEY FIT

Steps **1–4 choose** the right tool. Steps **5–7 implement** it so it gets used.

WORK THEM IN ORDER

Each step builds on the last — the business case shapes the cost model, the cost model and fit score shape the real-world test, and the test result tells you whether you're ready to own, phase, and measure the rollout.

STEP 1 OF 7

Build the Business Case Before You Look at Any Tool

Most businesses shop before they think. Start here, and you'll make a better decision — and be impossible to oversell.

70% of software implementations fail — and the #1 reason is **no clear problem definition upfront**. A business case isn't bureaucracy. It's your shield against a polished demo and an aggressive sales pitch.

WHY THIS STEP MATTERS

If you can't describe the problem, the people it affects, and the outcome you want — in plain English — you shouldn't be selecting a tool yet. This step forces that clarity before a single vendor is contacted.

Your Business Case Checklist

- [ ] The specific problem we're solving
- [ ] The business impact of leaving it unsolved
- [ ] The outcome we want from the right solution
- [ ] Who is affected and uses the process today
- [ ] The process or workflow involved
- [ ] The capabilities we need the solution to have
- [ ] How we'll measure success
- [ ] Our realistic budget range
- [ ] The implementation timeline we can commit to
- [ ] The cost of doing nothing

Common Traps to Avoid

→ Starting with a tool name instead of a problem

→ Letting one person's demo experience drive the decision

→ Solving for what the vendor says you need

→ Skipping the “cost of doing nothing” calculation

→ Not involving the people who will actually use it

PRO TIP

If your business case takes more than one page to write, you're solving too many problems at once. Pick the single biggest pain point. Solve that first.

STEP 2 OF 7

Calculate the True Cost — Not Just the Monthly Price

The price on the vendor's website is the smallest number you'll deal with. Here's how to find the real number.

WHY THIS STEP MATTERS

A tool that costs $79/month can end up costing $25,000 per year when you add setup, training, data migration, integrations, and the hours your team spends managing it. The cheapest tool is rarely the best value.

Full Cost Inventory

- ☐ Licensing / subscription (per user × seats)
- ☐ Setup / onboarding fees
- ☐ Data migration (from old system)
- ☐ Integrations with tools you already use
- ☐ Customization to fit your workflows
- ☐ Training (initial + ongoing for new hires)
- ☐ Internal labor (hours managing it)
- ☐ Reporting setup and dashboards
- ☐ Additional modules you'll need in Year 2
- ☐ Consultant / partner support
- ☐ Productivity loss during transition
- ☐ Ongoing maintenance and admin

The Value Side — What You Gain

- → Hours saved per week × team members × hourly cost
- → Faster billing / shorter collection cycle
- → Fewer errors and rework costs
- → Better customer experience → retention
- → Management visibility you don't have today
- → Revenue impact from faster processes

THE RIGHT QUESTION

Don't ask: “Is this tool affordable?” Ask: **“Does the business value it creates justify the total investment and complexity?”** If yes, even a higher-cost tool is the right choice.

✏ **TCO CALCULATOR — STEP 2** (write your estimates in each cell)

COST CATEGORY	YEAR 1 ESTIMATE	ANNUAL ONGOING
Licensing / Subscription		
Setup / Data Migration		
Training (Initial + Ongoing)		
Integrations / Customization		
Internal Labor + Admin Time		
TRUE TOTAL COST		

STEP 3 OF 7

Evaluate Fit Over Feature Volume

More features doesn't mean better results. The right tool for your business is the one that fits how you actually work — not the one with the longest list of capabilities.

WHY THIS STEP MATTERS

A smaller, simpler tool that fits your workflow creates more value than a robust platform that overwhelms your team. You'll never use 70% of enterprise features — but you will pay for all of them, and your team will suffer through a complicated system they don't understand.

Fit Evaluation Checklist

- [ ] **Process fit** — Does it match how we actually work?
- [ ] **Ease of use** — Can your team learn it without a consultant?
- [ ] **Integration** — Does it connect to tools you already use?
- [ ] **Reporting** — Can it produce the reports you need?
- [ ] **Scalability** — Will it still work when you're 2× bigger?
- [ ] **Security** — Does it meet your data protection needs?
- [ ] **Vendor support** — Is help available when things break?
- [ ] **Training resources** — Guides, videos, documentation?

✏ THE 3-VENDOR COMPARISON — RATE EACH 1–5

The highest score isn't always the winner — but a big gap usually tells you something important. Rate each vendor on the criteria that matter most to your business.

CRITERIA	TOOL A	TOOL B	TOOL C
Process Fit			
Ease of Use			
Integration			
Vendor Support			
Scalability			
TOTAL SCORE			

STEP 4 OF 7

Test With Real Scenarios — Not Vendor Demos

A vendor demo shows you the best case. You need to test the tool against your actual work — your data, your processes, your edge cases.

WHY THIS STEP MATTERS

Vendor demos are designed to impress, not to reveal weaknesses. The only way to know if a tool will work in your business is to run it through scenarios your business actually faces — before you sign the contract.

Real-World Test Scenarios

Pick the 3–5 most relevant and run them yourself (not the vendor):

- [ ] Enter a real lead and track it through the full sales process
- [ ] Create a project with real tasks, budget, deadlines
- [ ] Generate a customer quote and convert it to an invoice
- [ ] Track time against a job with actual team members
- [ ] Build a report from real data fields you actually use
- [ ] Test the full customer communication workflow end-to-end
- [ ] Run a month-end reporting scenario with your data
- [ ] Test mobile access for field or remote team members
- [ ] Have your least tech-savvy user try it without guidance

What to Look For During Testing

→ Steps that require a workaround (these multiply at scale)

→ Data that doesn't transfer cleanly from your existing system

→ Reports that require extra manual work to be useful

→ Features that work in demos but break with real data

→ Team members who get confused or frustrated quickly

→ Integrations that don't connect the way the vendor described

THE STICKY NOTE RULE

Give test users sticky notes. Every friction point or confusion gets a note. Count the notes after 30 minutes. High note counts = adoption problems ahead.

✏ **TEST LOG — STEP 4**

Tool being tested: __________________ | Date tested: ___________ | Tester(s): __________________

SCENARIO TESTED	PASS / FAIL	NOTES / ISSUES FOUND

STEP 5 OF 7

Assign Ownership Before You Sign Anything

Technology doesn't implement itself. Without an internal owner, you'll end up with a tool installed but not adopted — the most expensive kind of failure.

53%

of ERP and software implementations face active resistance from employees who don't want to change their work processes. **An internal champion with real authority changes this equation.**

WHY THIS STEP MATTERS

The vendor's job ends at configuration. Making the tool actually work inside your business — getting people to use it, keeping data clean, tracking adoption — that's your job. You need one person accountable for that, not “the team generally.”

What Your Internal Owner Must Own

- [ ] **Decision coordination** — final call on config choices
- [ ] **Process alignment** — mapping the tool to your workflows
- [ ] **Data readiness** — cleaning existing data before migration
- [ ] **User communication** — keeping the team informed and bought-in
- [ ] **Training coordination** — scheduling and tracking completion
- [ ] **Timeline management** — keeping the project on schedule
- [ ] **Issue resolution** — first line of response when things break
- [ ] **Adoption tracking** — monitoring who is using it and how
- [ ] **Success measurement** — reporting back against your metrics

What Good Ownership Looks Like

- → One named person — not “the IT team” or “operations”
- → Given protected time (not added to an already full plate)
- → Has authority to make decisions without a committee vote
- → Reports status directly to the business owner or CEO
- → Celebrates early wins publicly with the team

THE RIGHT OWNER ISN'T ALWAYS THE MOST TECHNICAL PERSON

Your internal owner needs to be respected by the team, organized, and willing to hold people accountable. Technical skills are secondary. Pick the person who gets things done.

✏ **OWNERSHIP PLAN — STEP 5**

Internal Owner (name + role)	
Time allocated (hours/week)	
Executive sponsor (final authority)	
Vendor contact / implementation manager	
Key team members who must be trained	

STEP 6 OF 7

Implement in Phases — Not All at Once

Trying to launch everything at once overwhelms your team, multiplies risk, and destroys adoption. A phased rollout turns a complex project into a series of manageable wins.

WHY THIS STEP MATTERS

When you launch everything on Day 1, your team is learning a new system while also doing their regular jobs. Things break. People get frustrated. Workarounds get created — and they don't go away. A phased approach lets the team stabilize before complexity increases.

The Standard 6-Phase Rollout Model

PHASE 1
Core Workflows
The must-have processes only. Get people logging in and doing real work in the system. Stabilize before anything else.

PHASE 2
Reporting & Dashboards
Now that data is flowing, configure the reports you need. Make them trusted. Build the habit of checking them regularly.

PHASE 3
Integrations
Connect the new tool to your other systems. Test data flow both directions. Fix integration gaps before adding complexity.

PHASE 4
Automation
Add automated workflows for the tasks your team does manually now. Only automate what is already working manually first.

PHASE 5
Advanced Features
Now unlock the advanced capabilities you bought. Your team has confidence in the system, so adoption of complexity is easier.

PHASE 6
Optimization
Review what's working, what's not, and make systemic improvements. Start the next budget cycle with data from Phase 6.

✏ **YOUR ROLLOUT PLAN — STEP 6**

PHASE	WHAT WE'LL LAUNCH	TARGET DATE	SUCCESS SIGNAL
Phase 1			
Phase 2			
Phase 3			

STEP 7 OF 7

Measure Adoption and Business Impact After Launch

Go-live is not the finish line. It's the beginning of the value-realization phase. The only real question is: Did the business get better?

WHY THIS STEP MATTERS

If you don't measure adoption and impact, you may confuse installation with success. A tool sitting on desktops that people work around is not success. It's wasted money with a nice dashboard. Real measurement tells you whether the business actually improved.

Adoption Signals to Track

- [ ] Are users logging in and using it consistently?
- [ ] Are the defined workflows being followed?
- [ ] Are reports being used and trusted?
- [ ] Has duplicate or manual work decreased?
- [ ] Are old spreadsheets or workarounds still being used?
- [ ] Are employees creating unofficial processes?
- [ ] Is support ticket volume decreasing over time?

Business Impact to Track

→ Has response time or cycle time improved?

→ Has customer experience improved (NPS, repeat business)?

→ Has leadership visibility into the business improved?

→ Has margin, productivity, or cash flow moved the right way?

Your 90-Day Review Cadence

WEEK 2 POST-LAUNCH

→ Is everyone logging in? Who isn't?

→ What are the top 3 friction points?

→ Any critical data or workflow issues?

DAY 30

→ Adoption rate vs. target

→ First business impact metric check

→ Workaround audit — where are people going around it?

DAY 90

→ Full impact review vs. original metrics

→ ROI estimate vs. total cost

→ Decision: proceed to next phase or fix first?

✏ **90-DAY SUCCESS TRACKER — STEP 7** (add the metrics that matter to you)

METRIC	BASELINE (BEFORE)	DAY 30	DAY 90	TARGET
Active Users / Login Rate				
Manual Work / Hours Saved				

FINAL CHECKPOINT

Master Decision Scorecard

Use this one-page summary to make — or confidently delay — your final technology decision. Every answer should come from your completed worksheets.

STEP	YOUR ANSWER / FINDING	CONFIDENCE & GO / NO-GO
1. Business Case		High / Medium / Low
2. True Total Cost		Understood / Mostly / Uncertain
3. Fit Score		Clear winner / Close / None
4. Real-World Test		Passed / Minor / Major
5. Ownership		Committed / Identified / None
6. Phase Plan		Written / Draft / None
7. Success Metrics		Baselined / Defined / Not yet

✓ Green Light Criteria

- → Steps 1–4 all show “Go”
- → An owner is named and committed
- → Phase 1 plan is written
- → Total cost is understood and approved
- → Success metrics are baselined

● Stop and Fix First If…

- → No internal owner is assigned
- → The business case is still unclear
- → Real-world testing revealed deal-breakers
- → True cost is significantly over budget
- → No fit advantage over a simpler, cheaper tool

FINAL DECISION Proceed ☐ Delay & fix first ☐ Walk away ☐ — Date: ______________ Decision owner: ____________________

IN CONCLUSION

The real question was never "Which tool should we buy?"

It was: "Will this technology make our business measurably better — and are we ready to make it work?"

If you've worked through every step, you now have the answer. Either you're ready to move forward with confidence — or you know exactly what to fix first. Both outcomes are wins.

Your Next Steps

Get Your BizHealth Diagnostic

See exactly where technology gaps are costing your business — and which tools will have the most impact on your specific scores.

bizhealth.ai

Full Module: Choose & Implement Technology

Go deeper with the complete BizGrowth Scaling module — case studies, vendor evaluation templates, and expert coaching.

bizhealth.ai/bizgrowth/scaling/choose-implement-technology

Work With a BizGuide Coach

For high-stakes decisions or complex implementations, a BizHealth coach can help you validate your decision and navigate the rollout.

bizhealth.ai/bizguides

GO BEYOND THIS ONE DECISION

This workbook fixed one decision. Now see the full picture of your business health.

A complete BizHealth assessment checks all 12 areas of your business — strategy, finances, operations, people, sales, and more — in about 90 minutes, benchmarked against proven frameworks. You'll uncover hidden gaps, confirm what's working, and know exactly where to focus to grow and scale with confidence.

→ Assess your business health at bizhealth.ai

AFFORDABLE, AI-POWERED DIAGNOSTICS
YOUR BUSINESS HEALTH COACH

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BIZGROWTH ACADEMY · SCALING SERIES

Stop Guessing. Start Growing.

BizHealth.ai turns business complexity into clear, confident decisions — so small business owners can grow on evidence, not guesswork.

TAKE THE ASSESSMENT
bizhealth.ai

THIS MODULE
bizhealth.ai/bizgrowth/scaling/choose-implement-technology

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