

Business Improvement Brief

Decide what should change and how to test it

What is preventing this part of the business from performing better, and what should change?

Use it for one part of the business at a time, such as a single process or team. Work through the six sections in order, noting where the evidence runs out. A blank field is a question still to answer, and on its own says nothing about whether a problem exists.

1. Name the problem and who owns it

Describe the problem in plain words before naming any solution.

Part of the business or process	
Accountable owner	
What is preventing it from performing better?	
What starts the work, and what counts as a finished, accepted result?	
Typical volume and measurement period	
What commercial outcome are you seeking, and by when?	

2. Establish the starting point

Map the work as it runs today, including checking, corrections and hand-offs. For each figure, record its source and whether it was measured or estimated.

Part of the work	Human effort per case	Waiting or elapsed time	Evidence/source
Preparation and finding information			
Producing the initial result			
Checking and approval			
Corrections and exceptions			
Hand-offs and administration			

Which systems and spreadsheets does the work rely on, and where does its data come from?	
How complete and accurate is that data, and who keeps it up to date?	
Cost: what does the work cost today, in staff time and tools?	
Delay: where does the work wait, and who is kept waiting?	
Quality: how is a good result judged, and how often is it missed?	
Risk: which errors or failures matter most, and what do they lead to?	
Customer impact: what do customers notice, and how do you know?	

3. Specify a change worth testing

What would change in the process?	
Where could automation, AI or modernised systems help, and with which tasks?	
What must a person judge, approve or own?	
What should happen when the system is uncertain or fails?	
Which roles, teams or responsibilities would change, and who needs to learn a new way of working?	
What data, permissions or integration would the change need, and are they ready?	
Which options have you compared: improve existing tools, buy, build, change the process or stop?	

Start with the simplest change that could work. Redesigning the process or making better use of a tool you already pay for may be enough, and AI is not always the answer.

4. Define a fair test

Test on comparable work, and measure the baseline and the trial in the same way.

Comparable tasks or cases	
Baseline observation period	
Trial observation period	
Quality and acceptance criteria agreed before the test	
Who reviews the output?	
Setup and training effort	
Recurring human effort and operating cost	
What evidence would make us continue, change course or stop?	

5. Connect improvement to a business result

A reduction in effort releases capacity. It becomes cash, revenue or profit only when a cost is removed or the time goes into work that earns money.

Where would released capacity go?	
What specific cost could genuinely be avoided?	
What additional work is there demand to deliver?	
Could the benefit instead be faster turnaround, better quality, lower risk or a lighter workload?	
Which benefit can be measured without counting the same improvement twice?	

6. Make the next decision

Decision: investigate further / run a bounded test / improve existing tools / buy / build / change the process / stop.

Owner	
Next action	
Date	
Evidence still missing	

TechGuidr gives independent advice on what to change, delivers the change and can run managed improvement once it is live. Separately from this free brief, the AI Brief session is a paid, fixed-price session in which we work through it with you on one recurring piece of work. Service details and current prices: www.techguidr.com.

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