Systems and Technology

A Practical Working Guide

An original Coaching Success companion. This is separate from the ActionCOACH guide and is not ActionCOACH-authored text.

A useful system helps people understand what needs to happen, who is responsible and where to turn when the usual approach does not fit. Technology can support that system. Before choosing a tool, examine the work it would need to support.

Start with the work

Choose one recurring activity that creates delays, rework or repeated questions. Follow a recent example from beginning to end. Where did information go missing? What had to be entered twice? Which step depended on someone remembering to act?

Clarify responsibility and exceptions

Write a short description of the normal process, including the person responsible for each handoff. Agree what a satisfactory result looks like and when someone should ask for help. Leave room for judgement: an unusual customer request may need a conversation rather than another checklist.

Choose technology around the need

Consider whether the tools you already use could support the change. Compare any new option against practical requirements: ease of use, access controls, compatibility, support, total cost and the ability to retrieve your information if you leave. Involve the people doing the work. Avoid collecting information simply because a tool makes it possible.

Try a limited change

Test one process with a manageable scope. Name an owner, provide time to learn and agree how work will continue if the tool fails. Protect confidential information and seek appropriate technical advice where needed. Do not automate a confusing process before understanding it.

Review, maintain and simplify

Ask whether the change made the work clearer and more dependable. Examine delays, mistakes and the effort required to maintain the system, alongside feedback from the people using it. Keep what helps, adjust what creates friction and retire unnecessary steps. Assign responsibility for updates so that the documented process stays useful as the business changes.

Your next step

Which recurring activity deserves a closer look? _____

Who will examine it, and when? _____