



A Methodology
For Managing Change
In Small & Mid-Sized Businesses

Playbook

Riteway Solutions Group © 2025

INTRODUCTION

Most businesses need to deliver change — but few small or mid-sized teams have the time, budget, or formal experience to follow big, enterprise-style project methods.

That's where the Deliverite™ Change Methodology comes in. It's a lightweight, practical approach designed specifically for SMBs who need structure without the red tape.

Whether you're leading a system upgrade, launching a new service, or just trying to fix something that's not working — this Playbook gives you a step-by-step path to get it done, with tools you can actually use.

We use the word 'change' — not 'project.' They mean the same thing, but 'change' just feels more natural. You might also see 'initiative' here and there — it's all the same idea.

What is the Deliverite™ Change Methodology?

Deliverite™ is a practical delivery framework for small and mid-sized businesses. It helps you successfully manage and implement change using easy-to-follow steps and simple tools. Whether you're improving a process, launching a new service, or updating a system, Deliverite™ gives you a way to get it done with structure, without overcomplicating it.

Why Use This Playbook?

1. **Streamlined Approach** - focus on what matters.
2. **Practical Templates** - made for real teams.
3. **Flexible and lightweight** - adaptable to any type of change or business.
4. **Results-driven** - easy to follow steps to move from idea to success.

Who is it For?

- Business owners and change leaders
- Team members involved in change
- Anyone who needs to deliver results without a full project team

How to Use the Playbook

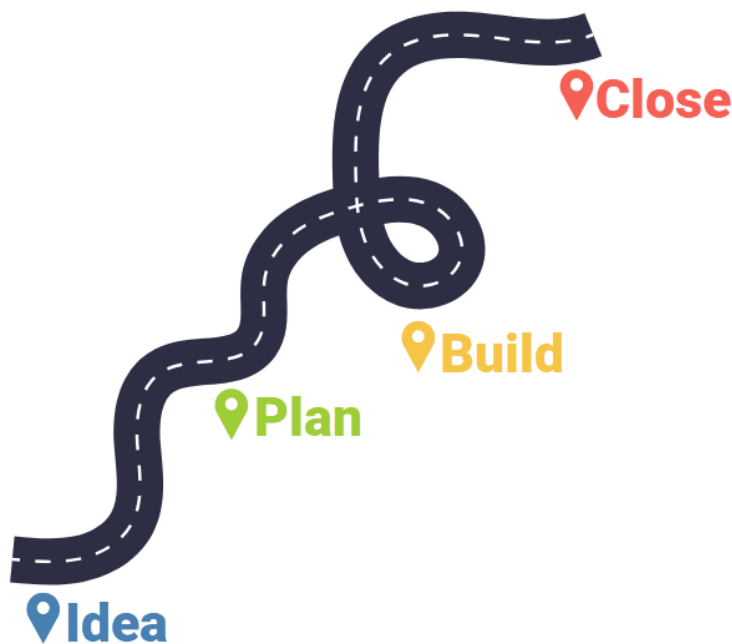
- Work through each phase sequentially: Idea, Plan, Build, Close.
- Use the tools and templates provided.
- Keep things moving. Don't wait for perfect.

How DeliveRite™ Works

DeliveRite™ is built around four simple phases. Each one answers a key question to keep your change on track:

1. **Idea** – Should we do this?
2. **Plan** – What are we doing, and how?
3. **Build** – Are we doing it?
4. **Close** – Did we do it?

Each phase has its own focus, tools, and checklists. This Playbook takes you through all four, step by step — just like a winding road takes you from point A to point B.



Pro Tip

- **Engage Early:** Involve key stakeholders from the start to build alignment and support.
- **Document Everything:** Use the templates to capture details at each phase.
- **Be Flexible:** Adapt the Playbook to suit your business's unique challenges.

Let's Get Started

You've got the overview. You've got the tools. Now let's walk through the phases and put it into practice — one step at a time.

GETTING STARTED

How to Use This Kit

This Playbook is your guide — but it works best alongside the ready-to-use templates included in the DeliveRite™ Kit. If you're new to managing change, start here.

What You'll Need:

- A copy of the DeliveRite™ Playbook (this guide)
- Access to the templates:
 - Change Brief
 - Action Plan
 - Task List
 - Risk List
 - Issue List
 - Progress Update Template
 - Completion Report
 - Handover Template

Tips Before You Begin

- **Skim the Playbook** first to get a feel for the steps.
- **Use the templates** — they're designed to make the process easier.
- **Don't overthink.** Start small. You don't need every answer upfront.
- **Stay flexible.** If you're working alone, adjust the steps to fit your pace.

Example Types of Change

This methodology works for almost any kind of internal business change:

- Launching a new product or service
- Rolling out new software or tools
- Updating a business process or workflow
- Relocating or redesigning a workspace
- Improving customer experience
- Introducing a new policy or team rhythm

The Playbook doesn't assume you're a project manager — it's here to walk you through one step at a time.

IDEA PHASE

Where Change Begins



Purpose

Decide whether a change is worth doing. Focus resources on what matters.



Deliverable

A completed **Change Brief**, including:

- The problem or opportunity
- Proposed solution
- Rough time/cost/resources
- What's in/out of scope
- Stakeholder endorsement
- Approval to proceed



Timeframe

1–2 hours (longer if the idea is still forming)



Key Question

Should we do this?

Action Steps

Step 1: Describe the Change

Every change starts with a problem to solve or an opportunity to improve something. Try to write a clear and concise description in your own words. Imagine explaining it to someone outside the business.

Exercise:

- What isn't working as well as it should?
- Where is the pain or inefficiency?

Example: "Fix delays in customer responses by introducing a shared support inbox."

Step 2: Summarise the Solution

Describe the proposed solution. You don't need detail yet — just a simple summary of what you're thinking.

Exercise:

- How would you fix the issue?
- Is this something that's been tried before?

Example: "Set up a shared mailbox with autoresponders and assign a team member each day to monitor it."

Step 3: What Will This Change Achieve?

Capture what success looks like. These should be real benefits — ideally tangible or measurable — even if only roughly.

Exercise:

- What will this change help us do better?
- What problems will it remove?
- How would we know it made a difference?

Example: "Faster reply times. Fewer complaints. Happier staff who aren't overloaded."

Step 4: Define the Scope

Use the Change Brief template fields to define:

- What's Included – The major tasks or deliverables
- What's Not Included – Things people might assume are in, but aren't

Exercise:

- What will we definitely deliver?
- What do we want to call out as not part of this change?

Example: Included: Setting up mailbox, staff roster. Not included: Changing CRM tools.

Step 5: Estimate Time & Cost

You don't need to be exact — ballpark estimates are fine. Think about how many days/weeks the work might take, and any major cost items (e.g., software, contractor time).

Exercise:

- Break the work into 2–3 big chunks. How many hours each?
- Are there any obvious costs?
- Who needs to be involved, and how long will they be needed?

Example: 3–4 weeks total. \$500 for tools + 1–2 days of internal effort.



PRO TIP: Use Effort, Not Duration

Start with rough hours of work (e.g., 12–15 hours), then work backwards to how long it might take across your team's availability.

Step 6: Align with Business Goals

List any company objectives, OKRs (Objectives and Key Results), or priorities this change supports. This strengthens your case for approval.

Exercise:

- What are your business's goals this quarter or year?
- How does this change support one or more of them?

Example: "Supports our FY25 goal to improve customer experience" or "Aligns with Q2 priority to reduce admin time."

Step 7: Get Endorsements & Approval

Making a change to something your business does today, or implementing something new requires allocation of people time and money. Unless you are the final authority on spending money and allocating work to people, you should share the draft Change Brief with anyone affected.

Make space for input. Then get sign-off from someone with the authority to approve it (usually a Sponsor or manager).

Exercise:

- Who needs to be across this early?
- Who has authority to approve it?
- How will you share it (email, chat, meeting)?

Green Light Check

- **Clear problem and solution?**
- **Realistic effort vs benefit?**
- **Key stakeholders supportive?**
- **Sponsor approved?**

If you can answer **YES** to the above, you are ready to move to the Plan Phase.

PLAN PHASE

Where The Direction Becomes Clear



Purpose

Turn your approved idea into a clear and structured plan that your team can follow.



Deliverables

A completed **Action Plan**, including:

- Detailed scope and milestones
- Key risks and mitigation actions
- Resources and timing
- Budget estimate
- Approval to proceed

You'll also create:

- A live **Task List**
- A live **Risk List**



Timeframe

A few hours to a few days, depending on the complexity of the change.



Key Question

What are we doing, and how will we do it?

Action Steps

Note:

Throughout this phase, you'll be working toward completing the **Action Plan** — your central planning document. Use it to capture all major inclusions, exclusions, milestones, resources, risks, and budget estimates. This is what gets signed off before delivery begins.

Step 1: Expand the Scope

Defining scope clearly is one of the most critical parts of planning. Poor scope leads to confusion, rework, and missed expectations.

Start by building on what you captured in the Change Brief but go deeper. Define:

- **Inclusions** – the major tasks, activities, or outputs you will deliver
- **Exclusions** – what is deliberately out of scope (to avoid misunderstandings)
- **Assumptions** – things you believe to be true, but that may still need to be confirmed

Be specific. Instead of saying "install software," say "install CRM software on all staff laptops." Instead of saying "training," say "deliver 2x 1-hour training sessions for the sales team."

Exercise:

- What are the key things that must be completed or handed over by the end of this change? (Think: documents, systems, training, processes — not just tasks.)
- What assumptions are you making that could affect scope or timing?
- What's clearly not included that people might otherwise expect?

Example: Included: Install CRM software for all staff, import existing customer data, configure user roles and permissions. **Excluded:** Integration with finance system, mobile app version. **Assumption:** Existing customer data is accurate and exportable from current system.

Step 2: Define The Milestones

What are Milestones?

Milestones are the major checkpoints in your change. They're not every task — just the key points where progress is visible or decisions are made. Milestones help everyone stay on track and give stakeholders confidence you're moving forward.

Exercise:

- What 3–5 milestones mark meaningful progress?
- When do you aim to hit each one?

Example: *Software installed by March 1, user testing complete by March 5.*

Step 3: Build the Task List

What is a Timeline?

Once your milestones are clear, break them into specific tasks. Tasks should be short, action-oriented, and assigned to someone. Tasks build momentum and give you a way to track daily progress. Remember that **milestones are outcomes**, and **tasks are what get you there**.

Exercise:

- What needs to happen to reach each milestone?
- Who will do it, and when?

Example: *Task: Order CRM licenses.*

Owner: IT Lead

Status: Not Started

Due Date: Feb 10

Notes: Licenses needed before installation can begin

**PRO TIP: Use the Task List Template**

The Deliverite™ Task List template is designed for this phase. It includes all the fields you need — task, owner, status, due date, and notes — and is easy to share and update as your change progresses.

Step 4: Identify Resources

What are Resources?

List the people, tools, and materials required to deliver the tasks. Once you have identified all the resources, confirm their availability with team leads or external vendors

Exercise:

- Who's doing the work?
- What tools or support do they need?

Example: Internal team (3 people), 2 external consultants, software access.

Step 5: Estimate Budget

Your budget doesn't need to be perfect, but it should include the main cost categories. Don't forget internal time, subscriptions, equipment, or vendor support. If unsure, add a small buffer.

Exercise:

- What's the estimated cost of people, tools, and extras?
- Are there any unknowns that need a buffer?

Example: \$2,500 for staff time, \$1,000 for licenses, \$500 for training.

Step 6: Capture Key Risks

Every change comes with a certain level of risk to its success — delays, people not being available, tools failing, scope creeping, etc. List the biggest risks and what you'll do if they happen. This isn't about removing all risk — it's about knowing what to watch for.



PRO TIP: Use the Risk List Template

DeliveRite™ includes a ready-to-go Risk List template. Use it to track risks, update status, and assign owners as the change progresses.

Exercise

- What's likely to delay or derail progress?
- How can you reduce the risk or soften the impact?

Example: Risk: staff not available for training. Mitigation: schedule in advance, get manager buy-in. Record this in your **Risk List** and review it regularly.

Step 7: Get Approval

By this point, you've created three key planning documents:

- A **completed Action Plan**, which outlines the full scope, milestones, resources, risks, and budget.
- A **Task List**, which breaks down the work into actionable steps.
- A **Risk List**, which shows how you're planning to monitor and respond to uncertainty.

The Action Plan is a fixed snapshot — once approved, it becomes the reference point for the Build Phase. The Task List and Risk List are live tools that will continue to evolve.

Before moving ahead, share the full picture with your Sponsor. Make sure they understand the scope, timing, risks, and resource implications.

Exercise:

- Who should review the plan?
- Who needs to formally approve it?

Example: Shared via Teams. Approved by Operations Manager.

Green Light Check

- **Plan shared and understood?**
- **Tasks and risks identified?**
- **Timeline and budget realistic?**
- **Sponsor approved?**

If you can answer **YES** to all of the above, you're ready to move into delivery.

BUILD PHASE

Where The Work Gets Done



Purpose

Execute the plan, track progress, manage risks, and deliver the change.



Deliverables

- Updated **Task List**, **Risk List**, and **Issue List**
- Regular **Progress Updates**
- A working solution that meets your defined scope
- A completed **Handover Package**



Timeframe

A few days to a few weeks depending on the size and complexity of the change.



Key Question:

Are we doing it?

Action Steps

The Build Phase is where things often feel the most chaotic — lots of moving parts, deadlines, and unexpected issues. But staying calm and structured makes a big difference. The steps below walk you through how to deliver your change confidently, even without formal project management experience.

Step 1: Kick Off

Before jumping into tasks, gather your team and walk through the plan. Make sure everyone understands their roles and what success looks like.

Exercise:

- Who needs to be briefed?
- Are roles and expectations clear?
- Are there any questions about what needs to be delivered?

Example: Short meeting with team to review milestones, assign early tasks, and raise any immediate concerns.

**PRO TIP: Align Early**

Start strong by making sure everyone knows who's doing what — especially if you're relying on people who don't normally work together.

Agenda for the Kickoff:

- Share and review the goals and scope.
- Confirm timelines, milestones, and task assignments.
- Setup rules on how you want communication and reporting managed.
- Address questions or concerns from the team.

Step 2: Track Progress

Tracking doesn't have to mean daily reporting or fancy dashboards. Just make sure you're regularly checking in on progress, updating your Task List, and keeping things visible to your team. Use your Task List to stay on top of what's complete, what's in progress, and what's falling behind. Update it at least once a week.

Exercise:

- Are task owners updating their progress?
- Is anything at risk of slipping?

Example: Weekly check-in reveals testing hasn't started. Task List updated and owner reminded.

Step 3: Manage Issues and Risks

Remember: issues are problems that have already happened. Risks are things that might happen. Keeping these lists current helps you stay proactive rather than reactive. New issues will come up. Some risks will evolve. Keep your Risk and Issue Lists current, and don't let small problems pile up.

Exercise:

- What new risks have appeared?
- Are previous risks getting worse or better?
- What issues need attention this week?

Example Issue Log:

[illegible]

PRO TIP: Don't Wait for Risks to Become Problems

Review the Risk List regularly. If something looks like it's getting close to becoming a problem — act early.

Step 4: Send Progress Updates

Stakeholders don't need pages of detail — just a simple update on what's done, what's coming, and where help might be needed. This keeps everyone aligned and confident.

Keep stakeholders informed using the Progress Update template. Include wins, challenges, and what's next.

Exercise:

- What have we completed since the last update?
- What's coming next?
- Are we red, amber, or green overall?

Example: Report sent every Thursday with three bullet points: What's Done, What's

Step 5: Ensure Quality

Quality means checking that what you delivered works as expected and meets the original goal. Don't rely on assumptions — review outputs and confirm they're usable. Don't assume everything is “done” just because it's marked complete. Do quick checks to confirm deliverables meet expectations.

Exercise:

- Has someone reviewed the output?
- Does it work the way it's supposed to?
- Have we tested with real users if relevant?

Example: CRM tested with two frontline users who flagged one missing permission.

**PRO TIP: Check Before You Hand Over**

Build in time to fix things before the final handover. It's easier to course correct midstream than clean up at the end.

Step 6: Prepare The Handover Package

Even simple changes benefit from a structured handover. Make sure the right people have what they need to own the change once your part is done. Gather everything needed to transition the change to its long-term owner. This includes documentation, contacts, and any open issues.

Exercise:

- What documentation or access needs to be handed over?
- Are there outstanding tasks that still need to be monitored?
- Who owns the change going forward?

Example: Change Handover includes CRM login guide, team contacts, and list of post-launch bugs.

Green Light Check

- Are all key tasks completed?
- Have issues been resolved or logged for follow-up?
- Has the handover been prepared?
- Is someone ready to take ownership?

If **YES** — it's time to close your change.

CLOSE PHASE

Wrapping It All Up



Purpose

Wrap up the change properly. Confirm everything is done, capture lessons, and hand over ownership to the right people.



Deliverables

- Completed **Completion Report**
- Finalised **Handover Package**
- Sponsor sign-off to close the change



Timeframe

1–2 days



Key Question

Did we do it?

Action Steps

Step 1: Confirm Completion

Check that all tasks have been completed and that deliverables meet expectations. This is your final opportunity to make adjustments or close out anything still pending.

Exercise:

- Are all planned deliverables marked as complete?
- Has each one been reviewed and accepted?

Example: Final check confirms CRM is live, team trained, and no open tickets remain.

Step 2: Capture Lessons Learned

Take 15–30 minutes to reflect with the team. What worked? What didn't? What would you do differently next time?

Exercise:

- What went well?
- What was harder than expected?
- What should we repeat, avoid, or improve?

Example: “Early stakeholder engagement really helped. Next time, we’ll do a test run before go-live.”

**PRO TIP: Keep It Simple**

Even a short debrief or quick survey can surface valuable insights. Just make sure they’re written down.

Step 3: Final Handover

Ensure the change is officially handed over and that the ongoing owner understands what’s now in their care.

Exercise:

- Have you finalised the Handover Template?
- Are contact details and documentation shared?
- Is there someone responsible going forward?

Example: Operations Manager confirmed as ongoing owner; all links and guides shared.

Step 4: Celebrate Success

Don’t skip this part. A quick thank you, email, or informal recognition can go a long way in building morale and supporting future change.

Exercise:

- Who contributed significantly to the success?
- How can you recognise their efforts?

Example: Send an email thanking team, followed by informal team lunch.

PRO TIP: Acknowledge Contributions

Organise a small team event or meeting to:

- Thank everyone for their efforts.
- Share the achievements.
- Recognise individual and team contributions.

A simple thank-you email, team lunch, or certificates of recognition can go a long way.

Green Light Check

- **Have all deliverables been completed and accepted?**
- **Has the sponsor approved the Completion Report?**
- **Has the handover been finalised?**
- **Have lessons been captured?**

If **YES** — your change is officially closed.

“CONGRATULATIONS”

Appendix A: DeliveRite™ Templates

The DeliveRite™ DIY Kit includes a suite of templates designed to make each phase of change easier to manage. These templates are practical, minimal, and aligned with the steps in this Playbook. You don't need to fill in every field perfectly — just enough to support clarity, progress, and alignment with your team or stakeholders.

Template	Purpose	When to Use	Example Contents
Change Brief	Summarise the problem, solution, scope, and rough effort	Idea Phase	Problem statement, proposed solution, time/cost estimate
Action Plan	Detailed plan for delivery, including scope, milestones, budget, and risks	Plan Phase	Inclusions/exclusions, timeline, resourcing, approvals
Task List	Live tracker for day-to-day delivery tasks	Plan & Build Phases	Task, Owner, Due Date, Status, Notes
Risk List	Track potential risks and mitigation plans	Plan & Build Phases	Risk description, likelihood, impact, mitigation, owner
Issue List	Track problems that have already occurred	Build Phase	Issue, priority, owner, actions, status
Progress Update	Summarise key updates for stakeholders	Build Phase	Summary of wins, blockers, what's next, RAG status
Handover Template	Capture key information for transitioning ownership	End of Build Phase	Key deliverables, documentation, contacts
Completion Report	Summarise what was delivered and lessons learned	Close Phase	What was done, what worked, lessons learned, final sign-off

Appendix B: DeliveRite™ Glossary of Terms

The following terms are used throughout the DeliveRite™ Methodology and Playbook to support clarity and ease of use for non-project managers.

Term	Meaning
Action Plan	Main document used to guide the project, based on scope, resources, and timeline
Change	A one-off improvement or shift in how something works — such as a new system, process, or product.
Change Brief	One-page summary of your change idea before detailed planning
Deliverable	A finished output of the project (e.g., a document, a completed installation, or a working process)
Delivery Lead	The person responsible for managing the change and making sure it's delivered as planned.
Dependencies	Tasks or steps that rely on something else being done first
Dependencies	When one task can't start until another is finished.
Escalation	Telling someone more senior about a problem that needs help or a decision.
Go-Live	The moment the change is officially launched or switched on
Green Light Check	A simple checkpoint used to confirm a phase is complete and ready to move on.
Handover	The process of transitioning responsibility to someone else once delivery is complete
Issue	Something that has already happened and needs fixing
Lessons Learned	What the team discovered — good or bad — that can help future projects run better.
Milestone	A key moment in the timeline — used to track progress and keep things on course.
RAG Status	Red/Amber/Green status to track progress visually
Risk	Something that might go wrong and affect delivery
Risk Mitigation	Actions taken to reduce the chance of a risk happening — or limit the damage if it does.

Scope	What's included (and what's not) in the work being done — defines the boundaries of the change.
Sponsor	The person with authority to approve and support the change
Stakeholder	Anyone impacted by or involved in the change
Task List	A list of specific steps needed to complete the project
Timeline	A simple schedule showing when things need to happen or be completed.
UAT (User Acceptance Testing)	A test phase where real users try the system before go-live

[end]