



A Simple Way
To Deliver Change
In Small & Mid-Sized Businesses

1st Edition

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INTRODUCTION

Overview of Methodology

A change methodology is simply a structured way to manage change. It gives people a clearer, faster, and more consistent path to getting things done — especially when change affects teams, tools, or how the business operates.

Traditional project management methods used in large organisations are often too complex and resource-heavy for small businesses. They rely on layers of documentation, strict rules, and dedicated roles — which just don't fit when resources are limited.

Without structure, many small teams end up relying on ad hoc processes. That usually means missed steps, miscommunication, and a higher chance of things going off track.

The DeliveRite™ Change Methodology was built specifically for small and mid-sized businesses. It helps you plan and deliver change with clarity — without needing project managers, thick binders, or corporate lingo.

It focuses on what actually matters: clear communication, realistic planning, and making progress. You get just enough structure to stay in control, without getting bogged down. The process is flexible, so you can adapt it to your business, your people, and your goals.

With simple tools and step-by-step guidance, DeliveRite™ helps you manage business changes without the stress. Even if you've never led a project before, you'll have a process you can follow — with the right support at every stage.

Purpose of Methodology

This methodology defines the approach and key processes for delivering change using the DeliveRite™ framework. It sets a clear standard for how change should be planned, coordinated, and delivered within a small or mid-sized business.

The purpose of the methodology is to:

- Establish a consistent way to talk about and document change across teams
- Provide practical guidance for those leading and supporting delivery efforts
- Clarify roles and responsibilities across decision-makers, team leads, and support staff
- Create a more structured and collaborative way of working — so that everyone understands their part in delivering successful change

What is a Project or Change?

A project or change is a short-term piece of work that's designed to achieve a specific improvement, innovation, or shift in how the business operates. It's different from day-to-day business operations, which are ongoing and repetitive.

A project or change has a clear beginning, a defined goal, and an end point — once the goal is achieved, the work stops, and the team moves on.

The DeliveRite™ Methodology defines a project or change as:

- A unique piece of work (not something you do regularly).
- Temporary, with a defined start and end.
- Focused on achieving specific results or improvements.
- Limited by available resources — people, time, and money.
- Led by someone responsible for making sure it succeeds.
- Planned and structured, even if only in a simple way.

You've probably run or been part of a project before — even if you didn't call it that at the time.

Examples of projects or changes might include:

- Moving offices or setting up a new site.
- Launching a new product or service.
- Upgrading finance or accounting systems.
- Migrating IT systems to the cloud.
- Delivering a one-off client solution.

What's not a project?

Ongoing tasks like payroll, monthly reporting, IT maintenance, or delivering your core services are part of business-as-usual. But if you're changing how any of those things are done — that's a project.

What is a Project or Delivery Lifecycle?

The term *project lifecycle* simply means the stages a project or change goes through — from idea to completion. It's a step-by-step structure that helps you plan, deliver, and wrap up a change properly.

Rather than jumping straight into doing the work, the lifecycle gives you a clear path to follow — so things don't get missed, rushed, or forgotten.

In large organisations, this process is often called the “Project Management Lifecycle.” In DeliveRite™, we keep it much simpler — just four key phases that guide you through delivering change.

The DeliveRite™ Lifecycle includes four phases:

- **Idea:** Evaluate the need and potential value of the change.
- **Plan:** Define how the change will be delivered.
- **Build:** Implement the change.
- **Close:** Confirm that everything was delivered, and the goal was achieved.

Each phase includes key actions and simple tools to help you move forward with confidence — like following a roadmap from point A to point B.

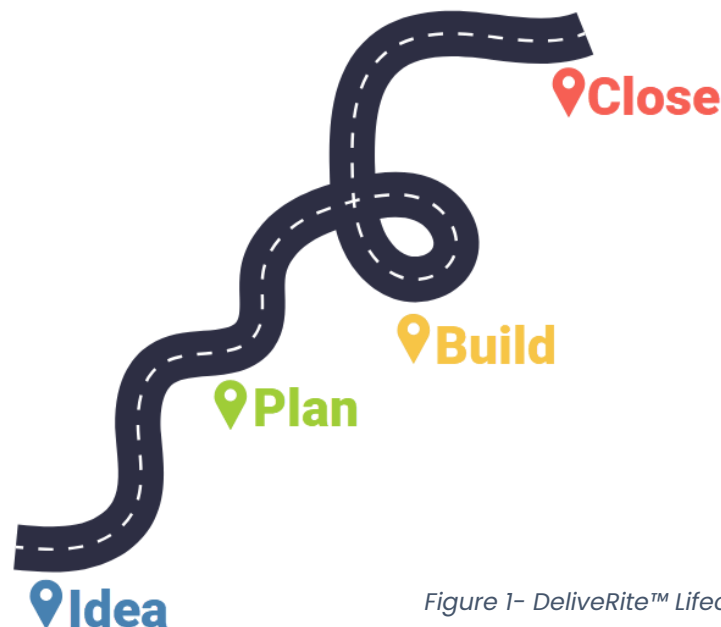


Figure 1- DeliveRite™ Lifecycle

Each phase also answers a key question:

- Idea: **SHOULD** we do it?
- Plan: **WHAT** are we doing, and **HOW** will we do it?
- Build: **ARE** we doing it as planned?
- Close: **DID** we do what we set out to do?

The DeliveRite™ phases are outlined in the sections that follow — showing what’s involved at each step, and how to know when you’re ready to move to the next phase.

THE IDEA PHASE

Overview

The **Idea Phase** is the starting point of the DeliveRite™ lifecycle. It helps you figure out whether a proposed change is worth doing — based on value, feasibility, and how it aligns with what matters most to the business.

By thinking it through early, you avoid wasting time or resources on ideas that aren't ready to move forward.

Ideas can originate from anywhere within the business, such as:

- Addressing inefficiencies or operational challenges.
- Responding to new regulations, customer or market demands.
- Exploring growth opportunities or innovations.
- Meeting specific client needs.

This phase ensures that only valuable, feasible ideas move forward — and that everyone's clear on why.

Objectives

The goal of this phase is to turn an idea into a clear change proposal — so the business can make a confident decision about whether to move ahead.

- Describe what the change is, and why it matters.
- Check if it's likely to work (based on rough time, cost, and effort).
- Get early input from the right people if needed.
- Confirm approval before planning begins.

Description

In this phase, the person who spotted the opportunity (the Idea Owner) fills out a simple Change Brief. This includes what the change is, the problem it solves, who it affects, and how much effort it might take.

If the idea impacts multiple parts of the business, the Idea Owner should check in with those teams before moving forward. Once the idea has support and makes sense, it can be approved and moved into the Plan Phase.

Activities

1. Capture the Idea

- Identify the need or opportunity
- Start the Change Brief with a simple description of what's being proposed

2. Check Feasibility

- Estimate the rough cost, time, and value of the change
- Think about which teams or people it will affect

3. Get Input (if needed)

- If the idea touches multiple departments, ask for input or informal agreement from those involved

4. Seek Approval

- Submit the Change Brief to someone with the authority to approve the idea
- Only move to planning once it's approved

Deliverables

What It's Called	What It Really Is
Change Brief	A short summary of what's happening, who's involved, and when
Approval to Proceed	A "yes" to move forward — usually from the business owner, manager, or leadership team

Green Light Check

Before moving to the Plan Phase, make sure the idea is clearly documented, has support if needed, and has been approved.

Things to check:

- Does it align with business priorities?
- Is it feasible based on rough effort, cost, and benefit?
- Have the right people had a chance to weigh in?

THE PLAN PHASE

Overview

The **Plan Phase** is where your idea becomes a practical plan. You'll map out what's involved, who's needed, what could go wrong, and how it will all get done. The goal is to give your team and stakeholders a clear path forward — before jumping into action.

Objectives

The goal of this phase is to build a simple plan that gives everyone clarity — before you start delivering the change.

- Outline what work needs to be done.
- Think about what could go wrong — and how to avoid it.
- Make sure the people involved are on the same page.

Description

The Plan Phase is one of the most important parts of delivering any change. This is where the original idea gets defined in more detail and turns into a workable plan.

At this point, the person leading the change (often you) works with others involved to figure out the key elements of how it will be delivered.

This includes:

- Listing out what needs to be delivered.
- Deciding who's doing what.
- Mapping a rough timeline with a few key check-ins.

The result is a clear and actionable plan that everyone understands and feels comfortable moving forward with — even if it's not perfect.

Activities

1. Clarify What's In and Out

- What exactly are you changing?
- What are you not changing?
- How will you know when it's been successful?

2. List the Big Steps

- Break the change into a few broad tasks or phases
- Put them in rough order (you don't need a Gantt chart)
- Mark any key dates or deadlines if you know them

3. Decide Who's Involved

- For each step, list who's helping
- It can be names, roles, or teams — keep it simple

4. Spot the Risks

- What could go wrong?
- Make a note of how likely it is, and what you'd do if it happens
- Don't try to list everything — focus on what feels real

5. Share the Plan

- Show your rough plan to anyone involved
- Get their input, and adjust if needed
- You're not asking for formal approval — just a thumbs-up to move forward

Deliverables

What It's Called	What It Really Is
Action Plan	A short summary of what's happening, who's involved, and when
Task List	A checklist or simple spreadsheet with tasks and timing
Risk List	A basic list of things that could go wrong and what to watch for
Green Light	Agreement to move ahead — verbal, email, or simple sign-off

Green Light Check

Before you move into the Build Phase, do a quick check to make sure the plan makes sense, and the people involved are comfortable with it. Once that happens, you've got the green light to get started.

THE BUILD PHASE

Overview

The **Build Phase** is where the work gets done. You take the plan you created and put it into action — completing tasks, tracking progress, managing risks, and making sure the change is delivered as planned.

The focus is on keeping things moving, dealing with issues early, and making sure the work stays on track.

Objectives

This phase is all about following through on the plan and making the change real.

- Complete the tasks in your Action Plan.
- Keep track of progress and update others.
- Spot risks and deal with issues as they come up.
- Deliver what was promised — ready to be handed over or used.

Description

In this phase, the Delivery Lead (that's you) coordinates the work with the team — which might include staff, suppliers, or contractors. The job is to keep everyone focused, resolve problems quickly, and make sure progress is steady.

This includes:

- Working through the Task List.
- Sharing regular updates on how things are going.
- Managing risks and issues.
- Checking that work meets expectations.
- Getting ready to hand over what's been delivered to the right people.

Activities

1. Execute the Plan

- Use the Task List to track what's done and what's next.
- Assign or follow up with people responsible for tasks.
- Adjust where needed if timelines shift.

2. Monitor Progress

- Run regular check-ins or updates
- Use simple status reports to keep everyone informed
- Be honest about blockers or delays — it helps more than hiding them

3. Manage Issues and Risks

- Keep your Risk List visible and updated
- Log and fix any issues that pop up
- Don't try to fix everything alone — ask for help when needed

4. Check Quality

- Make sure what's being delivered meets expectations
- Test or review where needed
- Ask for quick feedback if it helps catch issues early

5. Prepare to Wrap Up

- Get any final documentation in place (if needed)
- Share outcomes with those affected by the change
- Line up training or instructions if others need to use what you've delivered

Deliverables

What It's Called	What It Really Is
Completed Work Outputs	The change that was delivered — matching what was promised in the plan
Progress Updates	A quick way to show how things are tracking, and flag issues or risks
Handover Info	Any documents, notes, or training needed to help others take over or start using what's been built

Green Light Check

Before moving into the Close Phase, make sure everything is complete, up to standard, and ready to be handed over.

Things to check:

- Have all key tasks been finished?
- Are there any unresolved risks or issues?
- Is everything ready for others to take over or use?

THE CLOSE PHASE

Overview

The **Close Phase** is the final stage of the DeliveRite™ lifecycle. It's where you make sure everything is finished, handed over, and working as expected. It's also a chance to reflect on what went well (and what didn't), tidy up anything still open, and give the team a well-earned "job done."

Objectives

The goal here is to close things out with confidence — making sure nothing is left hanging.

- Check that everything promised has been delivered.
- Hand over responsibilities to whoever will run or use the change.
- Capture lessons for next time — what worked, what didn't.
- Get agreement that the change is done and can be closed.

Description

During this phase, the Delivery Lead checks that the change is complete, no loose ends remain, and everything is now owned by the right team. Any documents or instructions should be handed over, and if needed, quick follow-ups or training can be arranged.

It's also a chance to stop and look back:

- What did we learn?
- What would we do differently?
- What should we repeat next time?

That knowledge makes every future project smoother and faster.

And — don't forget — if this change made a difference, take a moment to recognise the effort. That's how teams build momentum.

Activities

1. Confirm Completion

- Double-check the Task List — is everything done?
- Have all deliverables met the agreed expectations?

2. Get Sign-Off

- Confirm with the sponsor or business owner that the job is complete
- Log final approval (even if it's just an email)

3. Handover

- Make sure ownership has shifted to the operational or business team
- Share any documents, files, or support info they need

4. Reflect and Capture Lessons

- Run a quick team review (can be informal)
- Write down what worked well and what could be improved
- Draft a short Completion Report with key takeaways

5. Celebrate

- Acknowledge the team's work
- A simple thank you or small celebration helps build goodwill for the next change

Deliverables

What It's Called	What It Really Is
Completion Report	A summary of what was delivered, what was learned, and who signed off
Closure Approval	A final "we're done" — usually from the sponsor, manager, or business lead

Green Light Check

Before closing the change, make sure nothing's left unresolved and everyone's on the same page.

Things to check:

- Have all deliverables been completed?
- Has everything been handed over and accepted?
- Has the sponsor or business lead agreed it's complete?

APPENDIX A: ROLES & RESPONSIBILITIES

The table below outlines the key roles involved in delivering change using the DeliveRite™ Methodology. It clarifies who's responsible for what, and when they're most active — helping everyone stay aligned and accountable throughout the process.

Role	What They Do	Most Active In
Idea Owner	Spots the opportunity for change, documents the idea, and prepares the Change Brief.	Idea
Delivery Lead	Plans, coordinates, and manages the change. May also be the Idea Owner once the change is approved.	Plan, Build, Close
Sponsor	Supports the change at a high level, gives approval to proceed, and confirms completion.	All phases
Stakeholders	Give input, provide feedback, and help shape decisions.	Plan, Build, Close
Team Members	Complete tasks, help solve problems, and support delivery.	Build, Close
External Consultants	Bring in expertise or extra capacity when needed.	Plan, Build
Vendors or Suppliers	Deliver key products, services, or systems required for the change.	Build

APPENDIX B: DEFINITIONS

The table below explains key terms used in the DeliveRite™ Methodology to provide clarity and consistency — especially for those without formal project background.

Term	Plain-English Definition
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
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.
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.

APPENDIX C: LIST OF TEMPLATES

The table below lists the templates used across the DeliveRite™ Methodology. It shows when each one is created, whether it stays fixed or gets updated during the project, and what it's used for.

Template	Phase	Status	Purpose
Change Brief	Idea	Fixed	Captures a simple overview of the proposed change — what, why, rough time/cost, and who's affected.
Action Plan	Plan	Fixed	Outlines what needs to happen, who's doing it, and when — including risks and resources.
Risk List	Plan	Live	Used to track possible risks, how likely they are, and what you'll do if they happen.
Task List	Plan	Live	Breaks the work into steps and helps you track progress as you go.
Progress Report	Build	Live	Summarises progress, highlights blockers, and keeps everyone in the loop.
Issues List	Build	Live	Captures problems that need to be resolved during delivery.
Handover Info	Build	Fixed	Gathers the key documents, notes, or instructions needed to pass the change to others.
Completion Report	Close	Fixed	Wraps everything up — what was delivered, what was learned, and confirmation that it's done.

APPENDIX D: TYPES OF CHANGES

The DeliveRite™ Methodology can be used to manage all kinds of change — from small upgrades to major rollouts. Below are examples of real projects that are ideal for this approach. If it has a beginning, middle, and end — and needs coordination — DeliveRite™ can help.

Technology & Systems

- Move email or files to the cloud
- Upgrade accounting or payroll software
- Launch a new CRM or HR platform
- Add multi-factor authentication or cybersecurity tools
- Set up employee self-service systems
- Build or replace your company website
- Introduce data analytics or reporting dashboards
- Establish a disaster recovery or backup plan
- Transition from on-prem servers to cloud

Operations & Process

- Automate a manual process or approval flow
- Go paperless or digitise key workflows
- Improve warehouse layouts or supply chain efficiency
- Standardise job descriptions or hiring steps
- Implement a knowledge base or document hub
- Set up online forms or digital signatures
- Optimise time-tracking or staff scheduling tools

Compliance & Risk

- Align with new data privacy regulations
- Update health & safety procedures
- Conduct a workplace compliance review
- Set up policies for IT governance, whistleblowing, or tax reporting
- Work toward industry certifications or accreditations
- Launch an environmental impact or sustainability initiative

Customer Engagement & Marketing

- Launch a customer loyalty or referral program
- Add live chat or self-service support
- Redesign your website or mobile experience
- Personalise marketing campaigns using segmentation
- Run educational webinars or how-to content
- Develop an app or customer portal

People & HR

- Roll out HR software for leave or payroll
- Improve onboarding or offboarding
- Launch a mentoring or training program
- Standardise performance review processes
- Create a flexible or remote work policy

Product & Service

- Launch a new product or service line
- Test a pilot or prototype with selected customers
- Introduce a subscription or bundled service offer
- Update packaging for sustainability or rebranding
- Partner on a co-branded offering
- Enter a new market or customer segment

Facilities & Logistics

- Move to a new office, warehouse, or shared space
- Upgrade to energy-efficient or smart systems
- Install EV chargers or solar panels
- Implement hot-desking or flexible workspaces
- Improve site security or access control
- Add vehicle tracking or optimise fleet routes

Sales & Finance

- Automate invoicing, payments, or budgeting
- Introduce a digital expense approval process
- Launch a real-time financial dashboard
- Run a cost-saving or supplier contract review
- Roll out new sales enablement or CRM tools
- Conduct a rebrand or repositioning campaign
- Expand your lead gen or advertising approach

ABOUT RITEWAY SOLUTIONS GROUP

Delivering Change with Confidence Since 2000

Riteway Solutions Group has been helping organisations deliver change since 2000 — across small businesses, large enterprises, and government agencies.

We offer delivery leadership, practical tools, and real-world support for all kinds of projects — from process improvements and tech rollouts to full business transformation. We've worked within both traditional and agile environments, and we always tailor the approach to suit your team, your goals, and your way of working.

About the DeliveRite™ Methodology

DeliveRite™ was built specifically for small and mid-sized businesses. It's a simple, flexible way to manage projects and internal change — even without a project manager or formal tools.

It brings structure without overcomplicating things, and it's one part of Riteway's mission to make project delivery easier and more effective for everyday teams.

What We Offer


- Hands-on delivery of projects and programs (enterprise & government)
- Coaching for teams without a formal project background
- Lightweight frameworks and toolkits for SMBs
- Support with vendor, team, and stakeholder coordination

Whether you're using a formal methodology or just figuring it out as you go — we're here to help you deliver with confidence.

Coming Soon: DeliveRite™ Training

We're building a short, practical training program for business owners, team leads, and internal change champions.


Whether you're new to projects or just want a better way to get them done, this training will guide you step by step — with examples, templates, and tips you can use straight away.

 **Want early access or a heads-up when it's live?**

[Visit our website](#) and join the waitlist.

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