

Business Systems Planning Brief

Sample brief: organise the questions needed to plan connected business systems.

1. Start with the purpose

Inventory the current tools, users, record owners and recurring costs. Map how a customer request becomes an order, delivery, invoice and management report.

2. Prepare the approach

Identify duplicated data, manual reconciliation and dependencies on one person. Separate problems caused by process ambiguity from those caused by software limitations.

3. Test the decision

Compare improving current tools, integrating them and replacing them. Evaluate lifecycle costs, migration effort, access controls, reporting and staff adoption.

4. Review and improve

Recommend a phased discovery and pilot plan with decision criteria. This planning brief offers a method and does not claim measured results from a named client.

Your next step

Record your priority, the person responsible, the evidence you need and the next review date. Use the framework to support a discussion with your team; adapt it to your organisation and seek relevant specialist advice where needed.

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