

About Valentina Coin

Valentina Coin is a digital transformation thought leader and the co-founder and director of Via Technology.

Valentina is a master organiser and change enabler with a proven track record of untying organisational knots. A true problem solver, Valentina is a student of her clients needs with the heart of a teacher to help them unlock their understanding of technology. Valentina enjoys seeing organisations grow and thrive through change.



Task Deconstruction Sheet

Start simple, stay practical

TASK

Title: _____

Purpose: _____

Owner: _____

Who else is involved: _____

INPUT

1. _____

2. _____

3. _____

BREAKDOWN

1. _____

2. _____

3. _____

4. _____

5. _____

6. _____

7. _____

8. _____

9. _____

10. _____

QUALITY CHECK

How do I know it's done well?





OUTPUT

Task Tune-Up

Streamline before you Systemise

Look at this task goal/purpose.

Does this task generate a meaningful outcome or valuable result? Yes No

→ If "no", consider removing or merging this task completely. If "yes", keep going.

The more "yes" this task receives, the greater the opportunities for improvement.

People & Ownership

Can the person responsible gather inputs more easily? Yes No

Can the responsibility for completing this task be assigned to multiple people/roles? Yes No

Consider the skills/tools/authorization required for this task. Can the task owner be made more independent? Yes No

Process & Flow

Can this task be performed in batches to reduce interruptions? Yes No

Are there repetitive steps that could be automated or removed? Yes No

Are there obvious bottlenecks where things slow down? Yes No

Are there wait times or delays that could be reduced? Yes No

Tools

Is the tech used outdated or no longer fit for purpose? Yes No

Experience

Does this task contribute to delivering an experience for staff, participants, partners or other stakeholders? Yes No

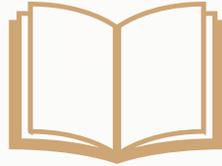
→ If not, is there a more human friendly alternative?

Total "yes" _ / 9

Pre-Demo Playbook

Don't just book a demo – Lead it

Here are the key principles to follow when writing a business use case. This will put you back in the driver's seat and get you the demo you actually want.



KEY PRINCIPLES

- 1 - Write the problem statement in the form of a short narrative from the perspective of a single user. Be very descriptive (the devil is in the details);
- 2 - Focus on a single high-value process, or up to 3 closely related processes at most;
- 3 - Select processes with a high level of complexity, but avoid rare scenarios and exceptional conditions. Focus on time-consuming processes that are executed often;
- 4 - Describe what the process is designed to achieve
- 5 - Describe the success factors;
- 6 - Describe each step of the process from the perspective of the process owner;
- 7 - Describe in detail what challenges and frustrations are typically encountered
- 8 - Describe how the process impacts other key processes.

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SAMPLE:

1. Problem Statement (short narrative)

'As the Client Services Coordinator, I juggle multiple systems to onboard a new client: email, spreadsheets, our CRM, and printed forms. I'm constantly chasing missing documents, duplicating data entry, and worrying something's been overlooked.'

2. Focus Process

Client onboarding includes: intake, documentation, team assignment.

3. Complexity & Frequency

"We onboard about 15 clients each month. It's a multi-team, time sensitive, very fast-paced process"

4. Process Purpose

"Ensuring new clients are fully set up, compliant, and ready to receive services within 5 days from enquiry is one of my role's KPIs and is in line with our company values."

5. Success Factors

Success looks like:

- All documents received and filed in one location*
 - Assigned team intro meeting booked within 5 days*
 - No missing info*
-

6. Key Steps

The current workflow is:

- 1. Receive intake info*
- 2. Create CRM profile*
- 3. Request documents*
- 4. Track and chase documents*
- 5. Confirm compliance*
- 6. Assign appropriate internal team*
- 7. Book intro meeting*
- 8. Notify Service Delivery manager*

Pre-Demo Playbook

Don't just book a demo – Lead it

7. Challenges

“At the moment, task handover is completely manual (we track it with emails), information is scattered across multiple systems, we have a slow response time and no reminders to follow up, which leads to a higher risk of missed steps.”

8. Impact on Other Processes

“Delays or gaps in onboarding slow down service delivery, rostering, billing, and workforce planning. Teams don't know when they'll start support, clients get frustrated, and early missteps can affect long-term trust.”

Feature Focus Sheet

No more shiny objects ; buy what you need, not what they sell

Feature	Business Outcome Supported	Must Have or Nice-to-Have	Frequency of Use	Requesting Department	Priority to Implement	Notes
e.g. Digital Forms	<i>Reduce manual admin, replace paperforms</i>	<i>Must Have</i>	<i>Daily</i>	<i>Operations</i>	<i>High</i>	<i>Urgent for Service Agreements</i>

Demo Debrief Scorecard

Cut through the pitch and choose tech your team will actually use.

Platform Name: _____

Name: _____

Role: _____

Rate your experience of today's demo, based on your role, from 1 = AGREE to 5 = DISAGREE.

	RATING	COMMENTS
1. The software improves communication between teams and clients		
2. The interface is well-designed, intuitive, and has a nice look & feel		
3. The platform is easy to use and has quality-of-life features our staff will value		
4. The software reduces manual work for me and my team. (e.g. maintaining excel trackers)		
5. The software has "smart features" that will help speed up the day to day operations for me and my team		
6. Reports and dashboards give a clear view of key information		
7. The system provides useful forecasting info to support planning and decision-making		
8. Workflows guide users step by step through complex tasks		
9. The vendor's team can "speak my language" and provide useful feedback/advice		

Notes: _____

SLA Clarity Checklist

Will they show up when it counts?

1. What is your guaranteed uptime, and how is it measured?

Why it matters:

Uptime directly affects your ability to operate. Look for contractual commitments of 99.8% or higher, and ask how it's calculated (e.g. does it exclude maintenance windows?).

2. What are your response & resolution time targets for different support tiers?

Why it matters:

You need clear targets for when they'll respond and how long they take to resolve issues, especially for critical incidents.

3. Do you offer 24/7 support? If not, what are your business hours & time zone?

Why it matters:

If their support hours don't match your operating hours, you risk being stuck during an outage.

4. What support channels are available (e.g. email, live chat, phone, ticketing)?

Why it matters:

More contact options = faster help. Some vendors restrict support to email or chat on the lower subscription tiers and only offer phone support for premium.

SLA CLARITY CHECKLIST

Will they show up when it counts?

5. How do you manage and communicate system outages or disruptions?

Why it matters:

Clear, timely updates help you manage client expectations and respond confidently during incidents.

6 What is your backup and disaster recovery policy? How often is it tested?

Why it matters:

In the event of data loss or corruption, you need fast, reliable recovery, and evidence that it actually works.

7. What happens if you breach the SLA? Do you offer compensation or service credits?

Why it matters:

A breach without consequences is a red flag. Ensure there's accountability if the vendor fails to deliver.

8. Is the SLA customizable? Can it be tailored to our business needs?

Why it matters:

This is not very common. However, some businesses need tighter response times or higher uptime. Make sure the SLA can flex to your risk profile.

