

# 30-Day Modernization Starter Worksheet

From the Modernization without the chaos webinar.

## How this works

Four weeks. Four steps. Print this, fill it out by hand, or open it in any PDF editor. By the end of the month you will have a real first move scoped and ready to start. You do not need software, a budget, or a consultant to use this worksheet. You need 30 minutes a week.

## Rules of the road

- Pick one problem. Not three. Not the biggest. The one your team feels weekly.
- Keep it small. If you cannot describe the fix in one paragraph, it is too big.
- Set a baseline before you change anything. You cannot prove a win without one.
- Name a champion who is not you. The owner has to live with the change.

## Week 1. Name the problem

Fill in one sentence using this structure: My team loses [X hours] every [Y frequency] because [Z reason].

Your one-sentence problem

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Where does this problem show up?

- Same question gets asked every week
- One person is the single point of failure
- A report takes longer to build than to read
- Customers wait while we chase down information
- We cannot tell if we are profitable until month-end

## Week 2. Find one champion

Pick the person on your team who feels this pain most. They become the owner. Not you. Owners need to be close enough to the work to know if the fix is working.

**Champion name**

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**Their role and how this problem hits them**

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**How you will know they are the right champion**

- They have complained about this problem unprompted in the last 30 days
- They have time in the next 30 days to focus on it
- They have authority to change the process or tool
- Other people on the team trust them to lead it

## Week 3. Set a baseline

Measure the current state before you change anything. Pick one of these. Write down the number. This is the only way to prove a win later.

**Baseline metric (pick one)**

- Time spent (hours per week or per cycle)
- Errors per week or per cycle
- Dollars lost, leaked, or uncollected
- Delay in days from start to finish
- Customer complaints per month tied to this problem

**Today's number for the metric you picked**

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**How you measured it (one sentence)**

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## Week 4. Scope your first fix

Describe the fix in one paragraph. Not a plan. Not a Gantt chart. A paragraph. If it cannot fit in one paragraph, it is too big and you need to shrink the scope.

### The fix, in one paragraph

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### Done means

What does the after state look like? Write one sentence.

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### Target finish date (under 90 days)

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### First step you will take this week

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### Self-check before you start

- Problem written in one sentence with a number in it
- Champion named and informed
- Baseline number written down
- Fix scoped to one paragraph
- Finish date is under 90 days

## When this worksheet is full

You have something most small businesses never get to. A scoped, owned, measurable first move. That is the entire point of the webinar in one printable page.

If a question comes up while you fill this out, reply to any TruNorth email or grab 20 minutes on Michelle's calendar. About half of the businesses we talk to fix the problem themselves with the worksheet. The other half want a hand. Both are fine.

## About TruNorth Dynamics

TruNorth Dynamics is a Microsoft consultancy based in the United States and Canada. We implement Dynamics 365, Power Platform, and AI for clients in manufacturing, distribution, professional services, accounting and advisory, and nonprofit. 250+ projects shipped over 12+ years. We are small on purpose.