

## When Something Isn't Working: A Business Triage Checklist

Use this checklist to quickly determine whether a stalled project, integration, or technology initiative needs business triage—and what to do next.

If you're nodding along to more than a few of these, **Business Triage** may be exactly what's needed right now.

### Your Project or Technology Launch

- The system technically “went live,” but teams still avoid using it
- Processes became slower or more manual after the implementation
- Reporting exists, but leadership doesn't fully trust the numbers
- The original project goals are no longer clear—or realistic

### Your Integration or Major Initiative

- An acquisition or integration never fully settled
- Different parts of the business now operate in different ways
- Workarounds are treated as normal operations

### Your Team & Culture

- Long-tenured employees are frustrated or disengaged
- New systems clash with “how the business actually works”
- People are protecting themselves instead of solving problems
- Meetings create more debate than decisions

### Your Leadership Reality

- Family leaders' sense something is off but lack clear visibility
- Decision-making feels heavier and more emotional than before
- Outside vendors blame adoption; teams blame the system
- You're unsure whether to push forward, pause, or reset

### The Cost of Waiting

- Time and money continue to be spent without visible progress
- The issue is starting to strain family or leadership relationships
- Everyone hopes it will “work itself out,” but it hasn't

**If this feels familiar: Business Triage provides rapid clarity, stabilization, and a practical path forward—while respecting the business and the legacy behind it**

