



# QUICK GUIDE

A Simplified Guide  
To The DeliveRite™  
Methodology

## HOW TO USE THIS GUIDE

This document gives you a simplified overview of the DeliveRite™ Methodology — a practical, no-fluff way to deliver business change without the complexity of traditional project management.

It's not the full manual. It's a starting point — designed to help you understand how DeliveRite™ works, what the four phases are, and how they fit together. You'll get a feel for how structured change can still be lightweight, flexible, and led by people who don't have "project" in their job title.

If this is your first time thinking about change in a structured way, you're in the right place. Keep reading — and when you're ready, open the tools in your Starter Kit and begin.

## INTRODUCING DELIVERITE

Change is unavoidable in business — whether it's upgrading systems, launching new services, or adapting to market shifts. But most small and mid-sized businesses don't have formal project managers, structured frameworks, or spare time to spend learning enterprise-grade methodologies. That's where DeliveRite™ comes in.

DeliveRite™ is a simple, practical approach to delivering change. It was built specifically for SMBs — not for enterprise PMOs or certified professionals. It removes the jargon, streamlines the process, and gives you just enough structure to plan, deliver, and close your change without overthinking it.

The methodology is split into four clear phases: Idea, Plan, Build, and Close. Each phase focuses on a single key question:

- Should we do this?
- What are we doing and how?
- Are we doing it?
- Did we do it?

DeliveRite™ helps you move through these questions with clarity and confidence. It includes lightweight tools like checklists, briefs, and task trackers — but more importantly, it builds momentum. Whether you're leading your first project or trying to bring structure to a busy team, DeliveRite™ gives you a proven pathway that makes change simpler, smoother, and more successful — without adding unnecessary overhead.

## GETTING STARTED

Every change starts as an idea — a spark of possibility. But not every idea should become a project. In fact, the only ideas that become projects or changes are those that deliver something that is different to what exists today and have a clearly defined start and finish.

The Idea Phase is where DeliveRite™ begins, helping you assess whether a proposed change is worth pursuing. This phase is about clarity, alignment, and early decision-making. It saves time and energy by ensuring you only move forward with initiatives that make sense.

In many businesses, ideas turn into action too quickly — without a clear understanding of the value, the scope, or the impact. That's how things get messy. The Idea Phase introduces a short, practical tool called the Change Brief. This document helps you define the problem or opportunity, outline the proposed solution, and get rough estimates of time, cost, and effort. It also prompts you to consider who might be affected, and whether other teams need to be involved.

You don't need detailed plans yet — just enough insight to have an informed conversation. The key outcome of this phase is a simple yes/no decision: Should we do this?

If your idea involves multiple departments or stakeholders, this phase also includes gathering early endorsements. It's not about politics — it's about buy-in. DeliveRite™ makes this easy by keeping the language simple and the process fast. If people can't see the value or feasibility at this point, then it may not be worth pursuing — and that's a good thing to know early.

When complete, the Idea Phase gives you a lightweight business case, a shared understanding of the change, and the confidence to either move forward or step back. You'll avoid wasted effort and begin your change journey with purpose.

## READY FOR ACTION

Once you've decided a change is worth pursuing, the next step is to figure out how you're going to deliver it. That's what the Plan Phase is for. It's where your idea becomes real — structured into steps, supported by people, and surrounded by just enough planning to move forward with confidence.

In many businesses, planning either gets skipped or becomes overwhelming. Some teams overthink it and never start. Others dive in too fast and hit confusion, delays, or conflict. DeliveRite™ strikes a balance. The goal here isn't a complex Gantt chart or a 40-page project plan. It's a simple, focused Action Plan that outlines what needs to happen, who's involved, and what to watch out for.

You'll use tools like the Task List and Risk Log to break the change into manageable chunks. You'll identify the major work areas, assign responsibilities, and estimate how long each piece might take. Risks are captured — not to predict every issue, but to avoid obvious problems before they hit. You'll also involve the right stakeholders early, so no one's surprised later on.

The core question this phase answers is: What are we doing, and how?

DeliveRite™ encourages teams to plan just enough — enough to align, to budget time and resources, and to identify dependencies. And importantly, you don't have to get it perfect. Your plan is a living thing. What matters most is that everyone involved has a shared view of the work ahead and agrees it's doable.

Before moving to Build, you'll review the plan with decision-makers and confirm a "green light." At this point, you'll have confidence in your direction, clarity in your roles, and structure to guide your next steps.

## TIME TO BUILD IT

The Build Phase is where your plan turns into action. It's the point where tasks are completed, progress is tracked, and the change begins to take shape in the real world. For many, this is the most visible and energising phase — but it's also where things can easily fall apart without the right structure and rhythm.

DeliveRite™ keeps this phase focused and manageable. You don't need dashboards or fancy software — just consistency. You'll use tools like the Task List to monitor progress, the Progress Update template to communicate with stakeholders, and the Issue List to track any problems that need fixing along the way. Risks are updated, blockers are logged, and simple check-ins help you keep momentum without wasting time.

The key question in the Build Phase is: Are we doing it?

Not "Did we talk about it?" or "Did someone send a status email?" — but are we actually delivering the work?

The Delivery Lead (which might be you) is responsible for keeping things moving. That doesn't mean doing all the work — it means checking in, clearing roadblocks, and making sure others have what they need. If tasks are delayed, timelines shift, or issues pop up, DeliveRite™ encourages fast responses, not finger-pointing.

You'll also start thinking about handover during this phase. Are we preparing documentation? Do the right people know what's changing? Is training or support required? These questions make the transition to operations smoother and reduce the risk of the change stalling after go-live.

By the end of the Build Phase, you should have a working solution, team alignment, and readiness to close. If something's off track, you'll know. If things are complete, you'll feel it. Either way, you'll be equipped to make smart decisions and finish strong.

## WRAPPING UP

Finishing strong is one of the most overlooked parts of delivering change — and that’s exactly what the Close Phase is designed to address. In small and mid-sized businesses, it’s common for teams to “move on” the moment something is launched or handed over. But that final 10% — where outcomes are checked, loose ends are tied up, and lessons are captured — is where real value is locked in.

The key question in this phase is: Did we do it?

DeliveRite™ guides you through the wrap-up process with simple, practical steps. First, you confirm whether all planned work is complete. The Completion Report helps capture what was delivered, what went well, and what challenges were faced. If there are any outstanding issues, risks, or next steps, they’re noted and assigned. You don’t need a long report — just an honest, clear summary of the outcome.

Next, you hand things over. This could mean documentation, tools, processes, or responsibilities — whatever others need to keep the change running. The Handover Info template ensures that the right people know what’s changed and how to manage it. You’ll also check that support, training, or ownership is in place — so your team isn’t dragged back in weeks later.

Finally, the Close Phase invites reflection. What did we learn? What would we do differently next time? These questions are captured in the Completion Report and used to build maturity — so each change gets easier, smoother, and more predictable.

And don’t forget to celebrate. Even small changes require focus, energy, and teamwork. A simple thank you, a team message, or a short recognition session goes a long way.

The Close Phase ensures your change is complete, recognised, and sustainable — and that your team is ready for whatever comes next.

You’ve now seen how the methodology works — and you’ve got tools to help you start.

## WHAT NOW? (START WHERE YOU ARE)

You’ve just read a simplified version of the full DeliveRite™ Methodology — now it’s time to put it into practice.

If you already have a change in mind, start with the Change Brief included in your Starter Kit. You don’t need a perfect plan — just enough to get your idea out of your head and onto a page. Then use the Readiness Checklist to check if it’s the right time to move forward.

Not sure where to begin? Start small. Talk to one other person about your idea. Test the AI tips provided to help shape your next step. What matters most is momentum.

DeliveRite™ is designed to support you as you go. You can stay light, adapt the tools, and keep things moving — without getting stuck in process.

And when you’re ready for more structure, more support, or more confidence — the full DeliveRite™ DIY Kit has you covered.

## WANT TO KNOW MORE?

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