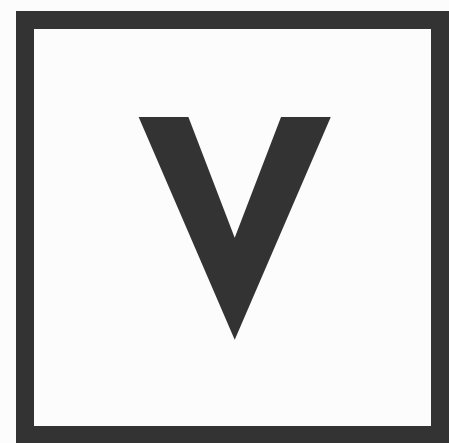




5 Keys to a **Successful** Tech Assessment



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1 GET PAID (IT'S A WIN-WIN)



Consultants and customers may hesitate about paid assessments because they assume it's paid discovery. It's not. A tech assessment delivers **tangible value** as a **quick low-cost test** of expertise. Payment allows the mobilization of resources for a meaningful output in return for the time invested.





2 DELIVER TANGIBLE VALUE (FIRST IMPRESSIONS COUNT)

Understand their needs, show how the proposed solution will meet their needs, and provide an architecture and roadmap for implementing the solution. By providing **clear, tangible outcomes** from the assessment, you're fulfilling a contractual obligation and nurturing trust.



3 MAKE DECISIONS (MYSTERIES INTO PUZZLES)



Your goal during an assessment is to turn mysteries into puzzles. Remove extraneous information. Lay out a basic framework for what needs to be known. Ensure a **coherent mental model** related to customer needs. Force them to make critical, well-defined decisions with an understanding of the pros and cons of the decisions.



4 INCLUDE EVERYONE (GET AHEAD OF THE VETO)



If you create a plan that does not consider the organization's needs and gets blocked at a later stage, then your plan does not add any value. You must **corral all the different business units** it touches and cater to their requirements so your proposed solution is implementable and actionable.



5 IMPLEMENT (PATH TO ENGAGEMENT)



Once you've made the roadmap, most customers also want you to implement the solution. Talk about what the customer should expect in that scenario. Tell them **how to engage** you, what you expect from them, your expectations for completing the work, and the expected cost of the engagement.





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