

MAKE THE FIRST MOVE WORTH MAKING

Executive Briefings

Key Takeaways

- **Begin where the evidence is strongest, not where enthusiasm for a solution is greatest.**
- **Make the first move large enough to produce meaningful evidence or meaningful improvement.**
- **Define what better looks like, measure the result, and let what you learn determine the next move.**

Estimated Reading Time: 4 minutes

There's always a reason to wait.

Another analysis would provide more information. Another stakeholder should be consulted. Another dependency could be examined. Another technology may appear. Another quarter might offer more capacity.

In a complex operating environment, certainty can always be improved.

It can rarely be completed.

Eventually, leadership has to decide whether it understands enough to make a move.

Not the biggest move.

Not the fastest move.

The right one.

Start Where the Evidence Is Strongest

The first action shouldn't depend upon enthusiasm.

It should depend upon evidence.

By now, the firm may already know where demand is creating strain. It may have identified complexity that no longer earns its cost. It may understand which constraint limits progress elsewhere and what processes, people, data, controls, and clients could be affected by changing it.

That knowledge creates a starting point.

Use it.

Begin where the problem is understood well enough to define what improvement should accomplish — and where the consequences of acting are clearer than the consequences of continuing to wait.

That's not certainty.

It's a reasoned decision.

Make the Move Large Enough to Matter

Small steps can reduce risk.

They can also become a way to avoid it.

A pilot that is too narrow may prove very little. An assessment without a decision attached to it may simply produce another document. A limited change may be easy to implement precisely because it avoids the difficult part of the problem.

The objective isn't to make the smallest possible move.

It's to make the smallest move capable of producing meaningful evidence or meaningful improvement.

That distinction matters.

A good first move should teach you something, change something, or make the next decision easier.

Preferably, it does more than one.

Define What Better Looks Like

Movement is easier to recognize when leadership knows what improvement is supposed to mean.

Fewer manual interventions?

Faster access to reliable information?

Less reconciliation?

Greater operating capacity without equivalent increases in effort?

Better visibility?

Reduced dependence on individual knowledge?

More consistent client service?

The measure will depend upon the problem.

But defining the intended improvement before making the change provides something essential: a way to distinguish genuine progress from successful implementation.

A project can be delivered exactly as designed and still fail to improve the business.

Completion is not the same as value.

Learn Before You Scale

The first meaningful change does not need to become the final model immediately.

Give the organization an opportunity to learn from it.

Did the expected improvement occur?

What assumptions proved correct?

What did the change reveal that was not visible before?

Did a dependency behave differently than expected?

Did the people doing the work experience the improvement leadership anticipated?

Those answers matter before extending the approach elsewhere.

Scaling an improvement can multiply value.

Scaling a mistake can multiply something else.

Closing Thought

Transformation language tends to make change sound enormous.

Real progress often looks more disciplined.

One constraint understood.

One meaningful intervention.

One result measured.

One lesson learned.

Then the next decision.

That approach doesn't lack ambition. It gives ambition somewhere solid to stand.

Asset and investment managers don't need to enter 2027 knowing every modernization decision they will make during the year.

They need to know enough to make the first good one — and enough discipline to learn from what happens next.

Finishing strong is not beginning 2027 by promising transformation. Instead, begin by making one change worth building upon.

Start the Conversation

- Every successful modernization initiative begins with a shared understanding of where you are today and where you want to go next.
- If your leadership team is evaluating modernization priorities, Anchor Bridge Innovations would welcome the opportunity to start that conversation.