

Is This Tool Helping Us Do the Job?

Use one sheet per tool. Talk with staff, then watch one task, including the handoff.

Tool / vendor: _____ Department: _____

GM: _____ Date: _____ Staff / roles: _____

Job we bought it to help us do: _____

1 ASK THE PEOPLE USING IT

1. What does this tool make easier?

2. Where do you get stuck or need help?

3. What do you keep in Excel, on paper, or somewhere else? Why?

4. Is there information you do not trust? Show me an example.

5. Where do you enter information again or switch tools to finish the job?

6. What one change would help you do this job better?

2 WATCH ONE TASK FROM START TO FINISH

Have a staff member do the job while you watch. Include the next person or department.

Task / handoff watched: _____

What happened? Write one example to show the vendor.

3 REVIEW THE ANSWERS, THEN BOOK THE VENDOR CALL

Take the example above. Mark what needs checking; more than one may apply.

☐ Training ☐ Wrong / missing info ☐ Systems not talking ☐ Can it do the job?

Include a staff user. Ask the vendor to show this task with the systems you already use.

4 LEAVE THE CALL WITH A COMMITMENT

Call date: _____ Vendor contact: _____

Agreed fix / training: _____

Person responsible: _____ Due: _____

Included in our price? ☐ Yes ☐ No ☐ Confirm Extra cost: _____

At the recheck, what must work? _____

Repeat task on: _____ ☐ Working ☐ Back to vendor ☐ Review another tool