

Prep kit for the diagnostic call

Seven things worth having at hand - 10 minutes

You have booked a 30-minute diagnostic call. There is nothing you must prepare, but if you have these things at hand we will come out of the conversation with a much sharper proposal.

What to have at hand

- ☐ **1. The task, in one sentence**
Which process you want to fix and what makes it painful. For example: "every Monday someone exports the orders from the ERP and builds the management report".
- ☐ **2. Who does it and how long it takes**
How many times a month, how many hours each time and what role does it.
- ☐ **3. A real example of today's output**
The Excel, PDF or report exactly as it is delivered today. We will look at it on a shared screen; no need to send it beforehand or strip the data.
- ☐ **4. Where the data comes from**
The name of your ERP or management software, whether it exports to Excel, whether its database can be accessed, and what arrives by email, forms or PDF.
- ☐ **5. Which tools the team already uses**
Microsoft 365 or Google Workspace, Excel, Power BI, any in-house software. Everything is built around what you already use.
- ☐ **6. What you would like to happen, and by when**
Have it run on its own, see it in a dashboard, fewer errors, free someone up. And any date that matters.
- ☐ **7. Who decides and who will use it**
If they are not the same person, it helps if both are on the call or know about it.

What you do not need

- x Logins or passwords: I will not ask for any on the call.
- x Real data: an example with masked or made-up figures is fine.
- x A decided budget: the proposal comes with a fixed price.
- x Technical knowledge: the questions are about the business.

How the call will go (30 minutes by video call)

- 10 min** Your situation: the task, who does it and what you would like to happen.
- 10 min** My questions: to tell whether it can be automated as is or something needs tidying first.
- 10 min** The shortest path: where I would start, with which tool and roughly how long.

Afterwards you receive a written proposal with scope, timeline and a fixed price. No sales follow-up if you do not reply.

The questions I will ask

- 01 Which task eats the most time, and how is it done today, step by step?
- 02 How often is it done, how long does it take and who does it?
- 03 What happens when it goes wrong or arrives late? Who is affected?
- 04 Where does the data come from and in what format?
- 05 Which tools do you already use, and which ones do you not want to change?
- 06 How would we know, three months from now, that the project has worked?

Notes for the call