

What I need from you

Business Systems Review

This list explains what I need for this service, why I need it and where you can usually find it. Send the information together where practical. Tell me straight away about anything unavailable or urgent. I will confirm when the essential information is complete and the delivery date is fixed.

Essential items are needed before the relevant work can proceed. Important items affect what I can conclude; optional items add useful context. If an item is missing, incomplete, unreadable or a different version from one already sent, identify it by its number and explain what you hold. I will tell you what replacement is needed, why it matters and any effect on the agreed work or date.

1. Access across the business, not one project **ESSENTIAL**

Why I need it. One project is a sample, not a business.

Where you'll find it. Whoever administers your systems, IT or the person who set up the accounts, can add a login across the commercial function rather than to one project: ask for the cost system, the document platform and the shared drive together.

Without it. One project only tells you about that project; the review cannot say anything about how the business runs

2. The process as described by each role, separately **ESSENTIAL**

Why I need it. The same step is run differently by different people.

Where you'll find it. Each role books their own hour, at their desk, going through last month's work on their own project rather than in a group session.

Without it. There is no first-hand account of how the process actually runs, so the review describes the procedure rather than the practice

3. Sample records from at least three projects **IMPORTANT**

Why I need it. The finding has to be about the business.

Where you'll find it. Wherever it already lives; nothing needs moving or tidying.

Without it. The report can only speak for the projects it actually saw, and every other project stays unreviewed rather than assumed similar

4. The licence and subscription list, with usage **IMPORTANT**

Why I need it. What is paid for and unused is the cheapest opportunity.

Where you'll find it. Whoever pays the subscriptions can pull the list in minutes.

Without it. The purchase findings rest on what people say they use rather than a verified seat count

5. Who does what, by role, across all live projects **IMPORTANT**

Why I need it. Dependency across a business is invisible from one job.

Where you'll find it. A short note from the commercial manager naming who does what by role across the live projects, including who covers each role on leave.

Without it. Dependency across the business stays invisible, and cover is recorded as unknown wherever nobody said otherwise

6. The executed main contract and the executed subcontract for each sampled project, with every amendment **ESSENTIAL**

Why I need it. The review takes each per-project cycles-a-year count from the payment provisions, and the work verifies every clause number against the executed document. Amendments differ from project to project, and that difference is usually the finding.

Where you'll find it. Whoever holds the contract file for each sampled project, usually the commercial manager: the executed and signed documents with their amendments, not the standard form and not the tender version. Ask project by project, because the amendments are what differ.

Without it. The review has no contractual source for a cycle count and the work can verify no clause, so the portfolio exposure section has nothing behind it and the review reports on process without ever testing it against what the contracts require

How to send it

Everything to contact@jackbutlerkettle.com. Original files rather than scans of printouts wherever you have them, and forwarded emails rather than text copied out of them, because the dates and the addressees travel with the original and they often turn out to matter.