

What I need from you

Business Systems Set-up

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. The accepted business review, and a written statement of which of its ranked items this build covers and which it does not **ESSENTIAL**

Why I need it. The specification is written from the review's ranked items and its variation analysis, and it cannot be written from an unaccepted one.

Where you'll find it. You have it; it is the document the price was built from. Acceptance and the covered items come back in one email from whoever accepted the review.

Without it. The build has nothing agreed to work against, and could cover the wrong scope for the whole business

2. The governance position and who owns it **ESSENTIAL**

Why I need it. Business-wide access is a bigger ask and needs stating.

Where you'll find it. One named person or forum on your side, usually whoever chairs your management or board meeting; a line naming them is enough.

Without it. Nobody has authority to say yes or no, and the build has no one to check against later

3. Real records from more than one project **ESSENTIAL**

Why I need it. A common system has to work on more than one shape of job.

Where you'll find it. Whoever exports from each project's live system, the project surveyors or whoever holds the logins; ask for straight exports with nothing cleaned or removed.

Without it. A system built on one project's shape breaks the first time a different kind of job runs through it

4. The pilot project, chosen and agreed **ESSENTIAL**

Why I need it. The rollout depends on a pilot that is representative.

Where you'll find it. Chosen together from the live list; the review usually makes the natural candidate obvious.

Without it. There is no live job to prove the spine on, so the rollout has nothing tested to point to

5. Named users by role, and time in their diaries **ESSENTIAL**

Why I need it. Each role is trained on its own work.

Where you'll find it. Each named user's own diary, booked for two hours in the week you agree; ask their line manager to hold the time rather than promising to find it later.

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Without it. Nobody is trained on the system they are meant to run, so the rollout has nobody ready on the day

6. Access to the systems and licences the build needs, on every project in scope **ESSENTIAL**

Why I need it. Nothing can be built or deployed without it, and the rollout touches every project rather than one.

Where you'll find it. Whoever pays the subscriptions or runs the tenancy can grant it in minutes; ask for it project by project against the rollout list, not as one blanket request.

Without it. The build stalls before it starts, or it is built on the pilot and then cannot be deployed to the projects the price assumed

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.