One task gives us a starting point

Choose a task from your own organisation. Work alone or discuss it with a colleague. You can type in the boxes or write on a printed copy.

The task I want to improve

Describe a recurring action, such as preparing a campaign selection.

Who uses the result, and what becomes easier?

The route the information takes

List the systems or teams in order. Add the connecting ID and correction owner where you know them. A question mark is a useful answer.

The handover I need to understand

Who could help me check it?

One gap is enough to begin

Use the same task. Check the information it needs before choosing a tool.

Which information does the task need?

Does it exist, and can we obtain it?

Name the source and who can arrange an export or access.

Is it fit for this task?

Consider duplicates, missing fields, freshness, format, consistency and accuracy. Which error would change the result?

Does the history and coverage fit the question?

There is no universal minimum amount of history.

The gap that matters most, and how I will check it

Access follows the purpose

Describe data categories rather than entering real donor or beneficiary information. Ask your privacy or system lead where approval is unclear.

Who needs the result, and for what purpose?

The minimum fields they need

Fields we can leave out or protect differently

The approved tool or channel

What needs confirmation, and who can confirm it?

Include any permission, sharing or retention question relevant to this task.

A small test needs a decision

Plan an improvement for your own organisation. A manual process change is a valid first step. Use synthetic examples until any real-data use is approved.

Owner: who will act, with what time?

Sponsor: who can approve or pause the work?

How does the task work today?

Record the baseline you need, such as total effort or types of error.

The first change and the evidence we will collect

Name the scope or sample. Include human review and correction effort.

What would make us continue, change or pause?

By [date], [owner] will [action]. We will review [evidence].

A review makes progress visible

Use these prompts to identify the conversation that will make your next action possible. This is a reflection tool, not a validated diagnostic.

Priority / ownership / capability / review

For each, write in place, partly in place or unknown. Circle the condition that most limits your next step.

The person I need to speak with, and the decision I need

By day 30: the first gap or handover to address

By day 60: how we will check the routine

By day 90: the evidence and decision to review

These dates are a suggested rhythm. Adapt them to your resources and agree an actual review date with the sponsor.