RESOURCE 01 - PRACTICAL GUIDE

Prepare for your digital and AI audit.

A checklist to choose an initial topic, involve the right people and identify useful information.

A starting point is enough.

Choose an activity you would like to improve or understand better: preparing a quotation, tracking a case, organising a visit. Your knowledge and your team's experience are already useful starting points.

USEFUL THINGS TO IDENTIFY

01

Your priority

- [ ] An improvement need or a recent difficulty has been identified.
- [ ] The desired outcome can be explained simply.

02

The right people

- [ ] The people who carry out the activity are identified.
- [ ] The person who decides or approves can be involved.

03

How work really happens

- [ ] The main stages can be described.
- [ ] A usual case and an exception can be described.

04

Tools and exchanges

- [ ] The software, files and records used are identified.
- [ ] Data re-entry and handovers are identified.

05

Available information

- [ ] A few recent examples can be found.
- [ ] Their location and the person holding them are known.

06

Constraints and checks

- [ ] The access needed and those responsible for it are identified.
- [ ] Approvals and scheduling constraints are known.

An empty box identifies a topic to explore. You can start with incomplete information and clarify the rest in conversation. You do not need a written procedure to complete this worksheet.

At this stage, these can wait: a comprehensive inventory, complete exports, a software choice or a detailed specification.

RESOURCE 01 - WORKSHEET

Your scoping worksheet.

Complete it on your own or with your team. Short answers are enough; unknowns can remain open.

Activity to examine

A specific scope: from the first message to sending the quotation.

People to involve

Roles or first names: delivery, administration, decisions.

What you would like to improve

An observable fact or a desired change; no need to invent a problem.

Desired outcome

What should become simpler, more reliable or easier to see.

Tools and records used

Software, email, Excel, paper documents...

Examples you could use

Describe their type and location without attaching documents.

What remains to be clarified

Open questions, information to find, assumptions to check.

Constraints to consider

Access, approvals, busy periods, dependencies.

Your next three actions

Practical action	With whom?	When?

> For each item, indicate what is **available**, **to be gathered** or **to be confirmed**. You can leave a question open.

RESOURCE 01 - COMPLETED EXAMPLE

A concrete first conversation.

See how an everyday situation can become a specific topic to examine. This example shows how to use the worksheet.

FICTIONAL TEACHING EXAMPLE - MAINTENANCE SME

Chosen activity

Handle a customer request until the quotation is sent and filed.

People to involve

The administrator, the technician who costs the work and the manager who approves it.

Observed difficulty

The same information is copied into the tracker and quotation. Some approvals remain pending.

Desired outcome

Identify re-entry and make approvals visible to track requests more clearly.

Available tools and examples

A shared inbox, quotes.xlsx, the service catalogue and a few representative recent cases.

What remains to be confirmed

About 20 requests per week are reported: an oral estimate to check over a representative period.

Known constraints

Prices must be approved by the manager. The technician's availability needs to be planned.

Three preparation actions

Find a few recent cases, including a delayed one.	With the administrator.
Describe the stages and approvals.	With the technician and manager.
Check the volume and available dates.	In the inbox and tracker.

What the audit could examine further

Information flows, reasons for waiting and useful checks. These could then support the examination of improvements and the evidence needed to assess their value.

Would you like to explore your situation? Let's talk at your pace.
contact@tinor.fr · **tinor.fr**

RESOURCE 01 - CONTINUATION SHEET

Notes and continuation.

For a detailed answer, write “see continuation” in the worksheet and identify the relevant section here. You can also continue a process or add another source.

Continuation 1 - relevant section, stage or source

Details to keep

Continuation 2 - relevant section, stage or source

Details to keep

Continuation 3 - relevant section, stage or source

Details to keep

Describe useful information without copying sensitive data, passwords or access keys. Duplicate this page if needed.