WORKSHEET 1.1

Preliminary call and purpose

Prepare a relevant session.

Spend 20-30 minutes with the host. Record roles rather than confidential personal details.

Reason and expected decision

Why now, which problem, what should management decide afterwards?

Participants and decision-maker

Roles, areas, sponsor and attendance for the decision.

Work setting and constraints

Languages, sites, network, sound, data protection and relevant reviewers.

Demo and examples

Owner, test date, approved industry examples and fallback material.

REVIEW CRITERION

Decision-maker, demo owner and purpose are confirmed before invitations.

WORKSHEET 1.2

Observe the demo

Separate experience from assumptions.

Take notes during a live conversation. After three minutes of outage record “transcript fallback; live untested” and use this fictional exchange: “Where do I report a discrepancy?” - “Which site?” - “West.” - “DB-4 §2 lists the West quality desk.” Interruption: “On weekends too?” - “There is no evidence for weekends. The shift lead checks the route.” Practice source DB-4 §2: “On weekdays the West site reports discrepancies to the West quality desk.”

Question and conversation situation

Wording, date and live or fallback. No access codes.

Answer and evidence

What was actually said, which source or label was apparent?

Limit and response

No source, contradiction, interruption or handover.

Implication for our setting

What would need checking before using it in our own process?

REVIEW CRITERION

Mode, supported claim and an outstanding question are recorded separately. Live testing remains open when the transcript is used.

WORKSHEET 1.3

Situation card

Capture a real work situation.

One sheet per situation. Describe the problem before naming a solution.

Trigger and task

When did it last occur and what needed to be completed?

Role and work location

Who was affected, where did the work happen and which device was available?

Frequency and consequence

Measured, estimated or unknown. Waiting, rework or missing information.

Help and source needed

Which answer or handover would have helped, and where is the knowledge today?

REVIEW CRITERION

Trigger, role, task and observable consequence are clear.

WORKSHEET 1.4

Limits and open questions

Make clarification needs visible and actionable.

Use the fields for one question per entry. Do not guess legal or product answers.

Open question or concern

Which specific situation remains unresolved?

What is known and what is missing?

Separate evidence, assumption and missing information.

Responsible contact and handover

Who can decide and how can they be reached?

Next clarification

Owner, required document and date.

REVIEW CRITERION

Every question relevant to the decision has an owner and date.

WORKSHEET 1.5

Candidates and next step

Record the agreed result.

Complete together and ask management to confirm. Continuing, deferring and stopping are possible.

First candidate area and rationale

Situation, impact hypothesis and main unproven assumption.

Second candidate area or parking lot

Reason for selection or later consideration.

Decision and sponsor

Continue, defer or stop. Who owns the decision?

Next steps

Preliminary call, format 2 or another clarification with owner and date.

REVIEW CRITERION

One or two justified candidates or a reasoned stop, plus a confirmed next step.