

Business & systems discovery

Understand the company.

Follow the work.

Build from the facts.

Helm Tech will use these discussions to understand how Skanem operates today, then identify practical opportunities for technology and AI.

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|--|--------------------|-------|
| 01 | The company | 02-09 |
| Locations, people, responsibilities, daily work and current tools. | | |
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|---|---------------------------|-------|
| 02 | Following the work | 10-17 |
| Recent examples, handled step by step with the people doing the work. | | |
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| 03 | Systems and AI | 18-24 |
| Data, software, access, infrastructure and operating requirements. | | |

Start with Part 1. Parts 2 and 3 are guided discussions with the relevant staff and IT owners. Helm will bring the findings together and explain the options.

The shaded fields in Part 1 can be completed in a PDF reader or filled in by hand. Short answers and approximate counts are welcome. Add rows or an existing list separately if needed.

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The business and its locations

Describe today's situation. Existing lists are welcome; Helm can complete this with your team. Where an answer belongs with someone else, give their role.

Name	Role / team	Date

01 Which companies, sites or business units should this discussion cover?

Company / site / unit	Main activities

02 What products or services does each location currently supply?

For each main type, say whether it is produced there, supplied by another Skanem location or obtained from an outside company.

03 What kinds of customers does the business currently serve?

Include the types of buyers, industries and regions served. Individual customer names are not needed here.

Activity and plans

Approximate counts are useful. Fill only what is readily known and identify who can confirm the rest.

04 **Approximately how much work was handled in the last completed month?**

Use the counts or units already used by the business.

Activity / output	Amount	Month / site	Who or what can confirm
Enquiries or quotations			
Orders or production jobs			
Output - state unit			
Another activity			

05 **What changes or commitments are already planned for the next year?**

Include new customers, products, equipment, sites, staffing changes or required dates. "None currently planned" is fine.

Helm will check the scope and scale of the work with the relevant teams before discussing changes.

People and responsibilities

Use Skanem's own team names. Roles or groups of people can be listed where there are no formal departments.

06 Approximately how many people work at each location?

Location	Regular employees	Temporary / agency / contract staff

07 What teams or departments exist, and what does each handle?

A person may handle several responsibilities. An existing organisation chart may be attached.

Team / role	Main responsibilities	People	Lead role	Reports to

08 Which activities are handled by another Skanem office or by an outside company?

List the activity and office or type of provider handling it.

Working arrangements

09 What are the working days, hours and shifts for each team?

Include weekend, overnight or seasonal arrangements.

10 Who is responsible for the following decisions, where applicable?

Roles are sufficient. Include another office if its approval is needed.

Decision	Person / role / office responsible
Customer prices and delivery commitments	
Purchasing and spending approval	
Production schedules and job release	
Quality acceptance or release	
Staffing and training	
Software, IT spending and data access	

11 Who can show Helm how each team’s day-to-day work is carried out?

A role or name for each team is enough. The team lead can nominate someone later.

A working day

Answer for the work you know. Helm will speak directly with staff from the other teams.

12 Thinking about your own last working day, what did you do from the start of the day to the end?

A short list of activities is enough.

13 What work repeats daily, weekly, monthly or occasionally in your team?

Include work outside customer orders, such as reports, stock counts, servicing, audits or staff administration, where applicable.

Activity	How often	Role performing it

14 How do people in your team receive their work for the day?

Describe where tasks come from and how staff know what to handle next: a supervisor, meeting, software, message, printed list or another arrangement.

Work and information

- 15 For one recent customer order, which teams or people were involved from the first contact through to payment?**

A simple sequence of team names is enough. Include other sites or outside parties involved.

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- 16 What reports or regular meetings are used to review the business?**

Include any existing targets or measures reviewed, if there are any.

Report / meeting	How often	Prepared by	Used by / discussed

- 17 What software or online services do the teams currently use?**

List the names you know. The person managing the systems can add details later.

Software / service	Team	Used for	Managed by

Tools and experience

18 Where else is work recorded or information kept?

Select what is used. Add which teams use it in the space below.

Paper files

Printed job sheets

Spreadsheets

Email

Messaging apps

Shared folders

Whiteboards

Personal notebooks

Passed verbally

19 What devices do staff use while doing their work?

For example: individual computers, shared terminals, phones, tablets, scanners, printers or machine screens. Include the teams using them.

20 Which languages are used in customer communication, documents and day-to-day work?

Include mixed-language communication and handwritten records.

21 Which description is closest to your own experience with AI?

Select one answer about your own experience.

Not familiar with it

Have heard about it but have not used it

Have tried an AI tool

Use AI tools regularly

Not sure whether tools I use include AI

Existing technology

22 Are any teams already using AI tools at work, as far as you know?

If yes, list the tool and its use. "None known" or "The team would need to confirm" are valid answers.

23 What work is already carried out automatically by existing software or equipment?

Include examples that do not use AI. Staff or IT providers can demonstrate these later.

24 What software, equipment or working processes have changed recently?

List changes from the last two years or currently being introduced, and the team or provider handling them if known.

25 Who manages IT support and who approves changes to systems or access to business information?

Give the roles, office or service provider. List both if support and approval sit with different people.

This completes the company overview. Helm will use it to arrange the next discussions with the people who carry out the work.

Following a recent example

With the people who perform or directly oversee the activity. Start with an ordinary completed example, then examine a variation. Relevant screens, messages, documents and physical records can be used.

W01 Which recent completed example can we walk through?

Activity, location, date, reference and agreed start and end points. Start with an ordinary case.

W02 What started the work?

Actual event or request, sender and date; whether work also starts on a schedule.

W03 What did you receive?

Information, materials or documents; sender, channel, format and identifying references.

W04 Who took responsibility for it?

Actual role and person; how work reached them and any shared responsibility.

W05 What happened next?

Each action in sequence, including physical work, calculations, conversations and movement between locations.

W06 What information did the person use?

Source records, instructions, specifications and knowledge used for the action.

W07 Where did they record or update the work?

Paper, files, messages or applications; details entered, source of those details, references and versions.

W08 What determined the next step?

Decision, rule, approval or judgment used in this example and who made it.

These prompts guide the conversation. Repeat the step-level questions as the example moves between people, teams or locations.

Timing, completion and variation

Continue the same example. A report, stock count, maintenance job or staff request can be followed in the same way.

W09 What did they check?

What was checked, against what, by whom, with what recorded result and purpose.

W10 What was passed to the next person or organization?

Digital or physical output, recipient, channel and how the recipient knew it was ready.

W11 When did each step happen?

Available dates or timestamps; elapsed time between steps and anything the item was waiting for.

W12 How much time did people spend doing the work?

Active working time, separately from elapsed time; identify measured figures and estimates.

W13 How could someone find its current status?

Record or person consulted, status updates and who could see them.

W14 What showed that the activity was complete?

Final output, completion record, recipient and any confirmation.

W15 How often does this activity happen?

Frequency and count for a stated recent period; units, source of the count and known seasonal or scheduled variations.

W16 Can we walk through a recent example that followed a different sequence?

What differed, the actual steps taken, additional people or records involved and the final outcome. Use W02-W15 where relevant.

Record active working time separately from elapsed time. Identify estimates as estimates and establish the purpose of checks and approvals.

Sales and customer contact

Use the activity map to choose the right people. An activity may sit in another team, be outsourced or not occur. Use only the prompts needed for the discussion.

Sales and marketing

- SM01 How did the most recent customer enquiry reach you?**

Source, recipient, information received, record created and next owner.
- SM02 How was a recent quotation prepared and sent?**

Requirements, sources for price and delivery information, contributors, approvals and quotation versions.
- SM03 How was the outcome of that quotation recorded?**

Customer response, follow-up actions, status record and handoff when accepted.
- SM04 What happened in a recent marketing activity?**

Activity and audience, information or material prepared, approvals, channels, responses recorded and resulting follow-up.
- SM05 What happened when an existing customer placed a repeat order?**

How the request was identified, past specifications and prices found, changes checked, account ownership and the next steps.

Customer service and orders

- CS01 What happened when a recent customer order arrived?**

Order details, checks, missing information, acceptance, commitments and records sent to other people.
- CS02 What happened when a customer changed an order?**

Original and revised details, approvals, affected records, people informed and confirmation to the customer.
- CS03 How was a recent customer request for status answered?**

Information consulted, people contacted, response channel and any update to the record.
- CS04 How was a recent customer question or complaint handled?**

Receipt, ownership, facts gathered, internal or external handoffs, customer response and closure.

Specifications and materials

Use the activity map to choose the right people. An activity may sit in another team, be outsourced or not occur. Use only the prompts needed for the discussion.

Artwork and specifications

- AR01 What artwork or specification information accompanied a recent job?**
Who supplied or created it, formats, references, storage and any information requested afterward.
- AR02 How was that artwork or specification reviewed and approved?**
Reviewers, checks, changes, approval record and version identification.
- AR03 How did the people doing the work receive the approved version?**
Release step, recipient, channel, job reference and how the applicable version was identified.
- AR04 What happened when artwork or a specification changed?**
Revised files or instructions, approvals, records updated, recipients and treatment of work already started.
- AR05 How was a recent new product or customer sample developed, if this work occurs?**
Request, trials, materials, contributors, test results, customer review, approval and final specifications.

Purchasing and stores

- PS01 What led to a recent purchase being placed?**
Request or calculation, item specification, quantity, supplier selection, approvals and purchase record.
- PS02 How was a recent supplier delivery followed through to receipt?**
Promised date, communications, arrival, quantity and condition checks, records and any differences handled.
- PS03 How was material moved from receipt to use on a recent job?**
Identification, storage, availability record, issue, physical handoffs and returns or leftovers where relevant.
- PS04 What happened during the most recent stock count?**
Scope, people, count records, comparisons, differences, approvals and updates.

Production, quality and maintenance

Use the activity map to choose the right people. An activity may sit in another team, be outsourced or not occur. Use only the prompts needed for the discussion.

Planning and production

PP01 How was a recent work plan or schedule prepared?

Demand, dates, material, people and equipment information used; decisions, records and recipients.

PP02 What happened when that plan changed?

Trigger, decision, revised sequence or dates, affected work and communications.

PP03 How was a recent job carried out from release to completion?

Instructions, actual production steps, responsible people, inputs, checks, quantities and completion records.

PP04 How was unfinished work handed over between people or shifts?

Physical items, status, quantities, instructions, issues still open and receiving person's acknowledgment.

Quality and maintenance

QM01 What happened during a recent quality check?

Stage, sample or item, criteria, method, checker, result, record and release decision.

QM02 What happened when material or output needed a separate decision?

Facts found, identification or hold, decision owner, records, disposition and people informed.

QM03 How was a recent planned equipment maintenance job handled?

Schedule or trigger, work instructions, people or provider, parts, work record and return to use.

QM04 What happened during a recent unplanned equipment interruption?

Detection, reporting, response, external support if used, work affected, timing and restoration record.

Delivery and finance

Use the activity map to choose the right people. An activity may sit in another team, be outsourced or not occur. Use only the prompts needed for the discussion.

Dispatch and logistics

DL01 What made a recent shipment ready for dispatch?

Release information, quantities, packing instructions, checks and authorizations.

DL02 How was that shipment prepared and handed to the carrier?

Packing, identification, documents, booking, physical handoff and records.

DL03 How was delivery tracked and confirmed?

Information sources, updates, proof or acknowledgment and recipients of the confirmation.

DL04 What happened in a recent partial shipment, return or delivery change?

Actual case available, revised quantities or dates, approvals, physical movement and records updated.

Finance and accounts

FA01 How was a recent customer invoice created and sent?

Trigger, source details, checks, approvals, posting and delivery to the customer.

FA02 How was a recent customer payment recorded and matched?

Receipt information, invoice references, matching, differences and any follow-up.

FA03 How was a recent supplier payment prepared and made?

Invoice receipt, purchase and receipt records, checks, approvals, payment and reconciliation.

FA04 What work was done for the most recent period-end close?

Recurring tasks, owners, source records, reconciliations, adjustments, reports, deadlines and handoffs.

FA05 How was the cost or margin of a recent job calculated?

Whether calculated, cost inputs, quoted versus actual figures, materials, labour, machine or other allocated costs, source records and who uses the result.

People and management

Use the activity map to choose the right people. An activity may sit in another team, be outsourced or not occur. Use only the prompts needed for the discussion.

People and administration

PA01 What happened when the most recent employee or regular worker joined?

Request, approvals, records, joining steps, responsible people and any outside provider involved.

PA02 How were attendance, leave and shift details prepared for the latest payroll cycle?

Sources, submissions, checks, corrections, approvals and handoff to payroll processing.

PA03 How was a recent training activity arranged and recorded?

Trigger, participants, scheduling, materials, attendance or completion records and follow-up.

PA04 How was a recent recurring administrative request handled?

Choose an actual activity such as facilities, supplies or travel; include request, approvals, provider, records and completion.

Management and recurring reviews

MR01 How was a recent management report prepared and used?

Purpose, period, owner, source records, calculations, checks, recipients and a decision or action recorded.

MR02 What happened at the most recent regular review meeting?

Participants, information brought, decisions, action owners, records and subsequent follow-up.

MR03 How was a recent decision involving more than one team or location made?

Request, information considered, participants, decision authority and communication to those carrying it out.

MR04 What recurring reviews, submissions or annual activities took place in the last year?

Actual activities, frequency, deadlines, owners, outside recipients, source records and a recent example to walk through.

Conversation record

One record per activity or distinct site variation. Attach a step list, existing process map or example reference as needed.

Activity, site and people involved

Where the activity starts and ends

Recent example and reference

Steps, handovers and records used

Timing and frequency - identify estimates

Corrections, open questions and who can confirm them

Evidence: Observed / Shown in records / Reported / Estimated / Unconfirmed

Information and records

With the relevant users, process owners, IT staff and providers. Existing inventories and demonstrations can supply answers. Record unknowns and who can confirm them.

Sources and usable inputs

- T01** For the mapped workflow, which official systems and records are used, and which spreadsheets, email threads, chat messages, notebooks or personal folders are used in practice?
- T02** Which inputs are structured records, editable documents, PDFs, scans, handwriting, photos, inspection images, audio or machine readings? Show representative examples and their file formats.
- T03** Where is each source stored, who owns it, and how can an authorised person obtain a usable sample?
- T04** How many files or records exist, how far back do they go, how much storage do they use, and how quickly are they growing?
- T05** In the sample records, which fields and pages are present, blank or unreadable? Identify duplicate copies, naming differences and whether the final outcome is recorded; Helm can check these with the record owner.

Record links, authority and corrections

- T06** Which identifiers link enquiries, quotes, orders, artwork revisions, jobs, material batches, inspections and dispatches? Are job IDs unique across sites and systems?
- T07** When sources disagree, which record is authoritative for each relevant field, and who settles the disagreement? Show a recent example.
- T08** Who creates, checks and updates the records, how often do they change, and how are changes made available to other users and systems?
- T09** Is there a history of versions, corrections and approvals? Show how a correction reaches affected jobs and how obsolete copies are identified.
- T10** What retention, deletion and archiving rules are currently followed, and what happens to linked records when a job closes or a customer record changes?

People and connected systems

With the relevant users, process owners, IT staff and providers. Existing inventories and demonstrations can supply answers. Record unknowns and who can confirm them.

Users, language, volume and retrieval

- T11** How many people perform or supervise the workflow at each site and shift, and which desktops, shared terminals, phones or other devices do they use?
- T12** How many users work on it at the same time during normal and peak periods, and how many requests, jobs or searches occur per day?
- T13** Which languages, mixed-language messages, abbreviations and specialist terms appear in the inputs and in staff communication?
- T14** How do staff currently find an answer or a past job: search screens, folders, filters, paper files or asking colleagues? Demonstrate a recent search and the time it took.
- T15** For the last few requests for information, where did staff find the answer? If an answer was unavailable, what happened next?

Systems, integration and permissions

- T16** Which applications and versions hold the relevant data, who administers each, and which vendor or internal team supports it?
- T17** Which supported APIs, exports, imports, reports or database interfaces exist? What documentation, licences, vendor restrictions and test environments are available?
- T18** How do people sign in, and which roles may view or retrieve which records, fields, sites and customer accounts? Are accounts or devices shared?
- T19** Which roles may create, edit, approve, release or delete records, and where are those permissions and approval steps enforced?
- T20** What integrations already read or write this data, under whose account, and how are successful changes, failures and duplicate updates recorded or corrected?

Infrastructure and information boundaries

With the relevant users, process owners, IT staff and providers. Existing inventories and demonstrations can supply answers. Record unknowns and who can confirm them.

Local infrastructure and continuity

- T21** What local servers, workstations, storage and operating systems are available, what are their specifications and current loads, and who can administer them?
- T22** How are sites, office devices, shop-floor devices and servers connected? What bandwidth limits, restricted network segments, remote access arrangements and recent outages affect the workflow?
- T23** What power interruptions occur, which equipment has UPS or generator coverage, and what happens to work during an interruption?
- T24** What is backed up, where are backups kept, who can restore them, and when was a restore last tested? What recovery time and data loss were observed or documented?

Existing boundaries and controls

- T25** Which cloud services and external vendors currently receive this information, and what approvals, contracts or customer restrictions govern that use?
- T26** Do existing requirements define what must remain local? What do they say about source data, prompts, outputs, search indexes, logs, backups and derived data? Record any areas with no agreed rule.
- T27** How are software downloads, licence checks, usage data sent to vendors, remote support and maintenance access currently handled? Include model downloads if any already occur.
- T28** What authentication, audit logging, encryption and incident-reporting arrangements already apply to these systems, and who owns each control?

Evidence and operating ownership

With the relevant users, process owners, IT staff and providers. Existing inventories and demonstrations can supply answers. Record unknowns and who can confirm them.

Correctness, decisions and evidence

- T29** Who can judge whether an answer or proposed result is correct, and what record or evidence do they use? How are missing information, conflicting sources and cases with no defensible answer handled today?
 - T30** Which decisions and actions currently require a person's judgement or approval, who provides it, and where is that approval recorded?
 - T31** What current measurements exist for turnaround time, search time, errors, rework, material waste and review effort?
Helm follow-up: establish how to measure any missing baseline with the people performing the work.
 - T32** Which historical cases include both the original inputs and an accepted outcome? Can owners identify routine cases, exceptions and past failures that could support a separate evaluation set?
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Operating ownership and cost

- T33** Who currently handles access requests, user support, failed integrations, infrastructure faults and incorrect source records, and during which hours?
- T34** How are changes to software, specifications, workflows and connected systems approved, tested, announced and reversed? What maintenance windows already exist?
- T35** Who owns the relevant operating budget, vendor renewals and purchase approvals, and what existing costs and staff time support this workflow and its systems?

Helm will establish how to measure any missing baseline with the people performing the work, then explain feasible options.

Agreeing the first system

Helm will explain the feasible options using the mapped work, evidence and demonstrations. These decisions will then be agreed together.

D01 Pilot scope and ownership

Select the first observed task, its users and sites, the accountable process owner, and the boundaries of the pilot.

D02 Information to use

Agree the approved inputs, authoritative sources, record links, exclusions, retention and development access; assign owners to resolve data gaps and maintain corrections.

D03 User experience and capacity

Agree supported languages, devices, interaction format, expected use, peak concurrency and acceptable response time after staff try examples.

D04 Retrieval and action permissions

Agree how each user's access applies to search results, quoted content, generated answers and stored outputs, as well as to any action the system can perform.

D05 Integration and human authority

Define permitted reads and writes, required approvals, prohibited actions, audit evidence and how an incorrect or partial update will be reversed or corrected.

D06 Exact local boundary

Define where documents, prompts, outputs, indexes, models, logs and backups may reside. Explicitly settle approved cloud use, telemetry, support access, downloads, updates and any offline requirement.

Putting it into daily use

Helm will explain the feasible options using the mapped work, evidence and demonstrations. These decisions will then be agreed together.

D07 Infrastructure and availability

Choose capacity and operating arrangements from measured demand, existing resources and technical trials; agree network, power, backup, restore and availability requirements.

D08 Correctness and uncertainty

Name the judges and required evidence, and agree what the system must do with missing, conflicting, outdated or unsupported information, including asking for help or giving no answer.

D09 Evaluation and acceptance

Measure the current baseline and reserve held-out routine and edge cases that are not used to tune the solution. Agree quality thresholds, unacceptable errors, time savings and human review effort before assessing the pilot.

D10 Rollout and fallback

Agree the order of deployment, staff training, who authorises expansion or suspension, and the working process staff will use if the system is unavailable or unreliable.

D11 Updates and support

Assign responsibility for monitoring, source changes, model and software updates, regression evaluation, incident response and restoration, with support hours and response expectations.

D12 Cost and continuation

Assign ownership of hardware, licences, maintenance, support and internal staff costs; agree the budget, review point and evidence required to continue or expand.

The first proposal will set out the scope, evidence, expected benefit, cost, responsibilities and the measures used to assess the result.

System or information record

Use one record per source, application, integration or infrastructure asset. Existing inventories can be attached or referenced.

Asset name, reference and purpose

Owner and support contact

Location, format and size / hardware capacity

History, growth and links to other records

Who can access it and what use is approved

How it is updated, corrected or connected

Evidence reviewed, open questions and who will confirm them

For integrations, include direction, frequency and failure handling. For hardware, include specifications and current load. Keep credentials outside this record.