

■ Free Practice Case

Debrief: what the stakeholders knew

Read this after your write-up, not before

Nine facts mattered. Most people find four or five on a first try. The ones that are easy to miss are the ones nobody volunteers, because to the person who knows them they are not news.

What there was to find	Who knew	A question that would have found it
Fixwell needs two working days' notice.	Sam	How do contractor jobs get booked today? What happens when a tenant picks a slot this week for a Fixwell job?
Dana and Sam disagree about contractor slots.	Dana vs Sam	Check Dana's answer with Sam. Log the conflict; do not choose.
Emergencies must never be booked online.	Dana	Which repairs should not be bookable online?
Tenants misdescribe problems; advisers re-triage.	Sam	What goes wrong between what a tenant reports and what the operative finds?
There is an unrecorded list of tenants needing extra help.	Sam	Are there tenants who need a different kind of appointment? How do you know who they are?
That list needs data protection approval before it goes in the CRM.	Morgan	Ask Morgan once you know the list exists. This is the finding that matters most.
Gas safety checks are out of scope for this route.	Morgan	Are any appointments booked in a different way or by a different team?
Text reminders need consent held elsewhere.	Morgan	Can we remind tenants of appointments? What do we need first?
No-access visits are the real cost behind missed appointments.	Sam	What does a missed appointment cost, and why do they happen?

What a good write-up includes

- Requirements traced to a named person and interview, marked approved or proposed. Dana's wishes are proposals until confirmed.
- The Dana and Sam conflict on contractor slots, logged with both sides and Dana as the person who decides.
- Emergencies and gas safety checks written down as out of scope, with the reason.
- The extra-help list raised with Morgan as an open question that blocks any requirement to show it in the CRM.
- No numbers you made up. If you wrote "bookable up to 48 hours ahead" without a source, mark it as your proposal.

Questions to ask yourself

- Did you check what one stakeholder told you with another?
- Did you ask what happens when things go wrong, not just the normal path?
- Did you ask about people who need something different?
- Did you find out who decides, not just who wants?

If the AI stakeholder said something that is not in the debrief, it drifted. That happens; treat it as a reminder to check every claim against a source.

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