

CLIENT GUIDANCE

How to complete your Codance questionnaire

Practical guidance for describing one real workflow and providing the evidence needed for a useful assessment or Blueprint.

Version	v0.1
Applies to	Readiness Assessment and Integration Blueprint
Read with	The relevant questionnaire and Westmoor worked example
Technical expertise	Not required

CORE PROMISE

Thoughtful, candid answers help Codance produce a report that is specific to your organisation and useful in practice.

Enterprise-grade AI integration thinking for smaller organisations.

1. Why your answers matter

Your answers form the evidence base for your Codance engagement. Each question reveals a different part of the workflow: what happens, where information is held, who exercises judgement, where exceptions arise and what a worthwhile improvement would need to achieve.

THIS IS NOT A TEST

We do not expect polished, technical or 'correct' answers. Candid descriptions of what really happens—including uncertainty, workarounds and occasions where 'it depends'—are often the most valuable.

A detailed answer does not need to be long. It needs to be concrete enough for us to understand the operation, distinguish evidence from assumption and ask sensible follow-up questions.

Question area	What it helps Codance understand
Boundary and outcome	Where the workflow begins and ends, what is included and what useful result must be produced.
Actual steps and handovers	How work moves in practice, including informal routes, waits, repetition and ownership gaps.
Information, decisions and exceptions	Which facts are authoritative, what follows a rule, what requires judgement and what happens when the normal path breaks down.
Value, authority and constraints	Whether the opportunity matters, what AI may assist with, what people must control and which limits apply.

2. How to answer well

- Describe one workflow that actually operates, not only the written procedure. Identify the event that starts it and the event that proves completion.
- Use roles rather than personal names unless a name is genuinely necessary to understand authority.
- Give ranges or estimates where exact measurements do not exist, and say 'unknown' where the organisation does not know.
- Include normal cases and exceptions. A rare but consequential exception may matter more than a common easy case.
- Identify where information conflicts, is copied between systems or depends on an experienced person's memory.
- Explain the consequence of delay or error in practical terms: customer impact, rework, financial exposure, compliance, safety or lost visibility.

3. What useful detail looks like

The examples below show how a little operational context makes an answer more useful. They are illustrations, not model answers that must be copied.

Topic	Too brief to assess	More useful
Starting event	We receive enquiries by email.	Most enquiries reach the shared sales inbox, but established customers sometimes email the estimator directly, so not every enquiry enters the shared log.
Current difficulty	Quotations take too long.	Average elapsed time is about four working days. Delay occurs while attachments are checked, previous jobs are found and missing information or supplier prices are obtained.
Source of truth	We use JobFlow and Excel.	Excel is treated as the outstanding-enquiry list, JobFlow stores formal job records and the shared drive often contains the most complete historic quotation. None reliably shows the whole current status.
Judgement and authority	The estimator approves it.	The estimator interprets the drawing and estimates labour. Quotations above £5,000, or involving unusual technical risk, require technical-director approval.

4. Using the Westmoor example

Westmoor Precision Engineering Ltd is fictional. Its worked questionnaire and sample report demonstrate how descriptions of volume, systems, judgement, exceptions and evidence combine into an assessment. Use it to understand the type of detail that helps; do not feel obliged to match its length, terminology or manufacturing context.

MOST USEFUL HABIT

When possible, describe one recent real case: what arrived, who handled it, what was missing, which systems were used, where it waited and how completion was recorded.

5. Evidence and confidentiality

Helpful evidence	Please avoid
Anonymised forms, emails, screenshots, checklists, process notes, example inputs and outputs, supplier proposals and summary measurements.	Passwords, API keys, access tokens, private keys, unnecessary personal information, unauthorised customer material or documents unrelated to the agreed workflow.
A small representative set covering successful, incomplete, conflicting and unusual cases.	Large unfiltered data dumps or confidential records supplied merely because they are available.

6. Before you submit

1. Confirm that the answers concern one defined workflow and one principal business function.
2. Check that the initiating event, useful outcome and completion event are clear.
3. Include the unofficial routes, workarounds, delays and exception cases that materially affect the result.
4. Distinguish known facts, estimates, assumptions and unknowns.
5. Anonymise supporting material and remove information that Codance does not need.
6. Confirm that you are authorised to commission the work and provide the supplied information.

7. What happens after submission

Stage	What Codance does
Review	Checks the workflow boundary, authority, package fit, completeness and safe use of evidence.
Clarification	Asks focused follow-up questions where an answer could materially change the finding or design.
Evidence cut-off	Records the evidence included in the engagement so later additions do not silently change the scope.
Analysis	Separates process improvement, deterministic control, AI assistance and decisions that must remain human.
Delivery	Produces the agreed Readiness Report or Integration Blueprint, with limitations and assumptions stated plainly.

NEED HELP?

If a question is unclear, explain what you think it is asking and describe the situation in your own words. Codance would rather clarify an honest answer than receive a confident guess.

The quality of the engagement depends on shared clarity, not specialist vocabulary. Your operational knowledge and our structured analysis perform different—and equally necessary—parts of the work.