CHAPTER 9 WORKSHEET

Information Systems

YOUR COUNTERSTEER	Data validated at entry, user access matched to role, and reports reconciled to source — not just the totals at the bottom of the page.
YOU WALK AWAY WITH	Numbers you can actually trust, because you know where they came from and who could touch them.

YOUR NAME | COMPANY | DATE STARTED

Fill this in on screen or print it. Type in any box and save the file to keep your answers. Don't polish it. Fill in what you know, leave the rest blank, and come back to it.

THE CHAPTER IN ONE MINUTE	
COUNTERSTEER	Data validated at entry, access matched to role, reports reconciled to source.
MEASURE IT WITH	Percent of entries passing validation; weekly reconciliation variance.
THE TRAP	Trusting totals nobody has traced back to the source.
THIS WEEK	List every system you run and mark the ones that don't talk to each other.

Your Assignment

Step 3 of the method: Grab the Wheel. Tick each one off as you finish it.

- ☐ List every system your business runs on, and mark which ones don't actually talk to each other. DONE ON
- ☐ The next time something breaks, note whether it was IT or IS — and who you actually called. DONE ON
- ☐ Ask one employee to describe your CRM, POS, or ERP in one sentence, and see if it matches yours. DONE ON
- ☐ Identify one third-party software vendor relationship you haven't reviewed in over a year. DONE ON

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Systems Inventory

Every system, including the spreadsheets. Tick the ones that don't share data with the others.

System	What it does	Owner	Shares data with	Doesn't talk	Re-keyed?
				☐	☐
				☐	☐
				☐	☐
				☐	☐
				☐	☐
				☐	☐
				☐	☐
				☐	☐
				☐	☐
				☐	☐
				☐	☐

IT or IS? The Break Log

IT is the equipment and the network. IS is the process and the data running on it. Note which one broke, and who you called.

Date	What broke	IT or IS	Who I called	Right call?
				☐
				☐
				☐
				☐

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The One-Sentence Test

System (CRM, POS or ERP)	
My one sentence	
Employee and their one sentence	

Do they match? ☐ Yes, it matches ☐ No, it doesn't

Software Vendor Review

One relationship you haven't reviewed in over a year.

Vendor and product	
Last reviewed	
Annual cost	
Renewal date and notice period	
Who has access, and does it match their role?	
Keep, renegotiate or replace? Why?	

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Find the Driver and Map Your Route

Step 1 and Step 2 of the method. Start with the result you want to move, then work down to the activity someone can change tomorrow morning. Write a person's name, not a department.

Result I want to improve *The number on the statement or report.*	
Financial driver affecting it *What is pushing that result up or down.*	
Activity driver my team can change *Something a person does, or doesn't do, every week.*	
Accountable Owner *One person, by name.*	
Measure and target *One number you can read in under a minute.*	
Tuesday review: day and time	

Tuesday Test: could someone move this number by doing something differently tomorrow morning? ☐ Yes, it passes ☐ No, pick a different driver

Copy this row to your Countersteer Dashboard (Appendix): Information Systems — activity driver, owner, measure and target. Review it for 15 minutes every Tuesday.

Your Commitment

This week *List every system you run and mark the ones that don't talk to each other.*	
Done by (date)	
Who will I tell I've done it?	

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