

OUR SCIENCE · HOW WE WORK · BEFORE THE
FIRST MEETING

The questions we ask first.

Map a laboratory workflow

Print this worksheet, answer what you can, and bring it to your first conversation with us. It holds the questions we ask in the first hour of the Understand phase, our on-site analysis of your workflow, in six groups. Each question says why we ask it, and your answers become the agenda for that first hour.

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01 HOW TO USE IT

Print it, answer what you can, and bring it.

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We ask these questions in the first hour of the Understand phase. Answer what you can, and leave the rest for the conversation.

Understand is the first of our four phases, followed by Build, Adopt, and Sustain. It is an on-site analysis of how your laboratory works, and it ends in a needs summary, user stories, and plans that you hold before any fixed price is set. How we work describes all four phases.

The conversation starts where your answers stop, and we ask the questions you leave blank at your bench.

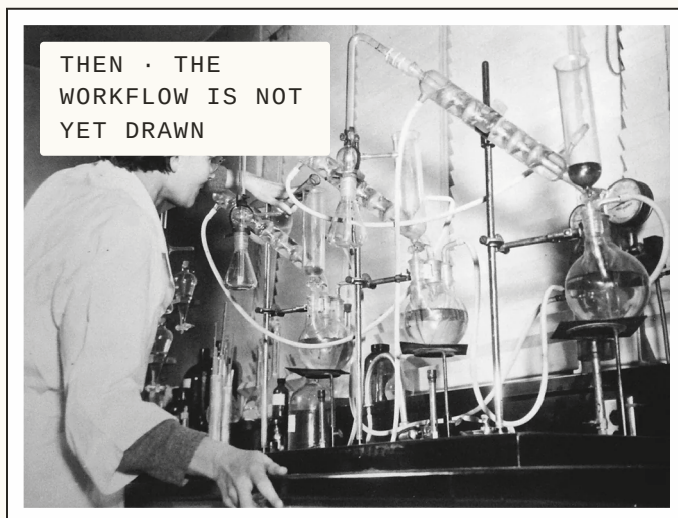


FIG. 1 A chemist checks a distillation train, undated archive photograph. A workflow is this bench, drawn.

THEN · undated · Wikimedia Commons · NOW ·
digitally rendered

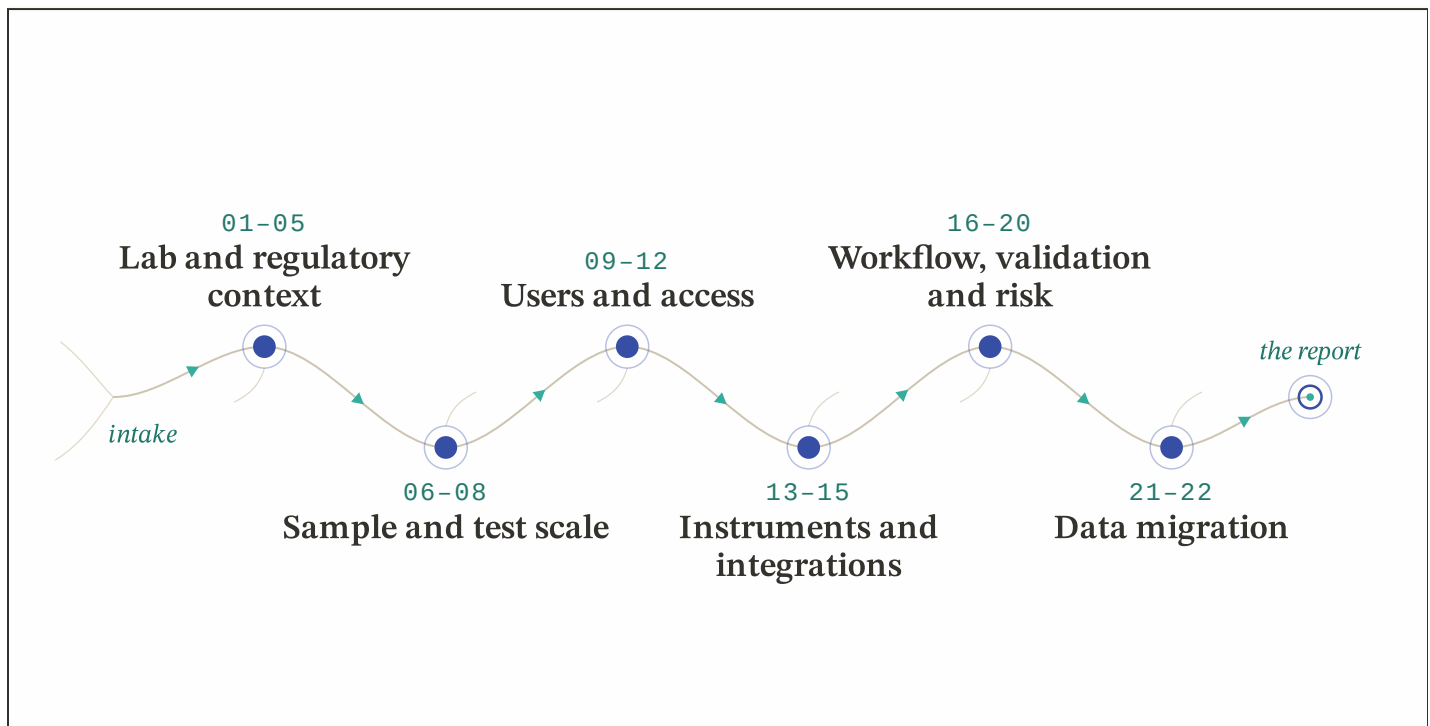


FIG. 2 The questions in their six groups, drawn as one line that follows a sample from intake to the report. Each point carries a group and its questions.

What your answers become

Each answer becomes part of the needs summary, and each need becomes a user story with a place in your priority order. Every story carries an estimate you can see. We plan against a probabilistic baseline instead of a best case, and we show you the confidence level we planned to.

The questionnaire sizes the work, and pricing comes later. Pricing explains how we price, with the Understand phase under project services. Evidence shows the work we have delivered, and Trust sets out the data and migration terms.

[How the four phases work →](#)

02 LAB AND REGULATORY CONTEXT

What the laboratory is, and who it answers to

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01

What is driving the timeline, such as an assessment, a retirement, a contract, or plain frustration?

WHY WE ASK The driver decides what has to work first and what can wait, and it tells us what “done” means to you.

02

Which regulatory or program reports does the laboratory file, and how are they assembled?

WHY WE ASK Reporting obligations set the shape of the record. A report assembled by hand every quarter is a workflow we need to see.

03

What system holds the laboratory record today, and how old is it?

WHY WE ASK The age of the system tells us about its data model, and about what a migration will meet when it opens the source.

04

What does it still do well, and what do people quietly work around?

WHY WE ASK The workarounds are the requirements nobody wrote down. What still works well is what the first delivery must not break.

05

Does a vendor, your IT group, or one person who knows where everything is support it today?

WHY WE ASK The answer sets the risk in the years after go-live, and it names the people we will work beside.

How much arrives, and in what form

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06

How many samples arrive on a normal day, and on the worst day of your year?

WHY WE ASK We plan capacity for the busiest day. The worst day is also the day the current system is most worked around.

07

How do samples arrive (courier, mail, drop-off, field collection), and who logs them in?

WHY WE ASK Intake is where the record starts. Who logs the sample in decides where the first screen goes and what it has to carry.

08

How many distinct sample types and test panels does the laboratory run?

WHY WE ASK The count sizes the configuration work, because methods, specifications, result codes, and units are rows we set up together. It is a better measure than sample volume.

04 USERS AND ACCESS

Who touches the record, inside the laboratory and outside it

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09

Who receives your reports, and do they arrive by portal, PDF, fax, or mail?

WHY WE ASK The report is the product your submitters see. Its form decides whether a portal belongs in the first delivery or a later one.

10

Can submitters check the status of their samples without calling the laboratory?

WHY WE ASK Every status call is bench time. A portal changes who answers the question, and how often it is asked.

11

Does your organization run Microsoft 365, and who administers the tenant?

WHY WE ASK Our platform is built natively on Microsoft Dataverse and the Power Platform. If your tenant exists, the people who run it are part of the answer, and the system can live where your data already does.

12

Who has to approve a new system (IT, security, purchasing, a parent agency), and in what order?

WHY WE ASK The approval order is the real project timeline. We plan the Understand phase around it rather than discover it afterward.

05 INSTRUMENTS AND INTEGRATIONS

Which results arrive by hand, and which by wire

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Which instruments produce results that someone types in by hand?

WHY WE ASK Every hand-typed result is a transcription step, and a candidate for an interface. We list them before we rank them.

14

Which instruments are already interfaced, and does each connect through ASTM, HL7, middleware, or vendor software?

WHY WE ASK We either keep an existing interface or rebuild it, and in both cases we need to know the protocol it uses. We deliver interfaces per instrument and per laboratory.

15

When an instrument is replaced, who rebuilds the connection?

WHY WE ASK An interface outlives its instrument only if someone owns it. The answer tells us who owns the connection after go-live.

06 WORKFLOW, VALIDATION AND RISK

Where paper enters, and where a signature releases a result

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16

Which paper forms arrive with samples, and which does the bench fill in by hand?

WHY WE ASK The forms are the record before any system sees it. We read them before we read the screens.

17

Who retypes paper into a system today, and roughly how many hours a week does it take?

WHY WE ASK Your own count of hours is the baseline we measure against. The person doing the re-keying is the first user we design for.

18

Where do the filled worksheets go after they are transcribed, and who could find one from last March?

WHY WE ASK A record is only useful if you can find it. Finding old records is a requirement in its own right.

19

Who reviews and signs results before they release, and on what screen or paper does that happen?

WHY WE ASK Review and sign-out is a control an assessor examines. We configure it to the way you do it now.

20

When a released result is amended, how is the original preserved?

WHY WE ASK Amendment history is the audit trail. How you preserve the original today is how the system must preserve it.

07 DATA MIGRATION

How much history moves, and how far back

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21

How many years of records live in the current system, and how far back do searches actually go?

WHY WE ASK The years you search are the years worth migrating. The rest may be archived rather than moved.

22

If you moved, would you bring no history, the active year, or everything?

WHY WE ASK Migration is a project of its own, priced after we have seen the source. The depth you choose sets its size.

08 HOW TO SEND IT

Bring it to the conversation, or send it ahead.

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Print or save the questions as a PDF and bring them to the conversation. To book a conversation, talk with an expert for thirty minutes on your calendar.

You can also email your answers to info@synsci.com, and we will read them before we meet.

This questionnaire is informational only. Answering it creates no obligation and is not a quote.