

PRINTABLE WORKSHEET

Crew Capture Checklist

Pressure-test whether a field workflow helps crews capture useful facts at the moment of work.

Use this worksheet with the interactive guide. Complete it as a team, record disagreements, and choose one improvement to test.

COMPANY	PROJECT / SITE	TEAM	DATE

Checklist

Score each dimension from 0 to 2: 0 = no, 1 = partly, 2 = yes. Score the workflow crews actually use, not only its intended configuration.

DIMENSION	QUESTION	SCORE
Crew value	Does capture help the crew do something faster, easier, or safer?	☐ 0 ☐ 1 ☐ 2
Moment of capture	Can crews capture facts when they happen?	☐ 0 ☐ 1 ☐ 2
Field friction	Can capture happen with minimal typing and interruption?	☐ 0 ☐ 1 ☐ 2
Mobile reality	Does it work on phones, tablets, and offline jobsites?	☐ 0 ☐ 1 ☐ 2
Safety conduit	Does it use safety workflows already embedded in the work?	☐ 0 ☐ 1 ☐ 2
Crew context	Is data tied to worker, crew, task, location, and time?	☐ 0 ☐ 1 ☐ 2
Risk context	Is data tied to forms, permits, hazards, incidents, and actions?	☐ 0 ☐ 1 ☐ 2

Checklist - continued

DIMENSION	QUESTION	SCORE
Daily-log support	Can daily reports be assembled from captured events?	☐ 0 ☐ 1 ☐ 2
Business protection	Would the record help explain what happened months later?	☐ 0 ☐ 1 ☐ 2
Closed-loop follow-up	Can hazards, questions, and issues become tracked actions?	☐ 0 ☐ 1 ☐ 2
Integration	Does field data flow to other systems without retyping?	☐ 0 ☐ 1 ☐ 2
AI usefulness	Does AI reduce typing, answer questions, or surface patterns?	☐ 0 ☐ 1 ☐ 2
Trust and governance	Are answers, permissions, review, and data ownership clear?	☐ 0 ☐ 1 ☐ 2

TOTAL	READ
0-8	Report-first workflow
9-16	Digital documentation
17-22	Crew-capture ready
23-26	Operational-safety ready

TOTAL / 26	BIGGEST FRICTION	FIRST WORKFLOW TO TEST

From diagnosis to action

Choose one improvement specific enough to test with one crew and one workflow.

PROMPT	NOTES
Which moment of work should be captured at the source?	
Which information does the crew enter more than once?	
What currently blocks same-day capture?	
Which field fact should automatically support the daily log?	
How will the crew know a reported issue was resolved?	

Decision: ☐ proceed ☐ pilot first ☐ redesign the workflow ☐ stop

OWNER	START DATE	REVIEW DATE