USE A TOOL: LEARN IT, DO IT, REPORT AND SIGN OFF

You have Standard and want to finish one of the ten tools.

BEFORE YOU START

HAVE THESE READY (ABOUT 60 MINUTES)

- ✔ Standard (the business plan is free).
- ✔ Your five questions answered.

STEP BY STEP

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9 STEPS

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1 Step 1 of 9 **Screen: Everything we do, in one place.**

How to get there: Tap Services at the top of any page.

What you see: Cyan cards in four groups: Start, Build, Grow, Connect.

Tap: the tool you want, for example Supply chain

What happens next: The tool's page opens.

If something goes wrong: If it still does not work, tap "Talk to a person" on the Help page and tell us what you see.

2 Step 2 of 9 **Screen: the tool's name, for example "Supply chain"**

How to get there: From the Services page.

What you see: What it gives you, how it works, what to have ready, and its seven topics.

Tap: Start now

What happens next: If you have no project yet for this tool, the project screen opens.

If something goes wrong: "This is part of Standard": you need Standard first. See guide E1.

3 Step 3 of 9 **Screen: the tool's project**

How to get there: It opens after Start now.

What you see: Your project for this tool, with its team, activities and risks.

Tap: Save

Type: The project's name and dates, for example "Supplier list 2026", 1 March to 30 June.

What happens next: Your project is open. The black status strip at the top shows your next step.

If something goes wrong: If it still does not work, tap "Talk to a person" on the Help page and tell us what you see.

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4 Step 4 of 9 **Screen: the tool's name**

How to get there: Lessons for this tool, in the status strip.

What you see: Seven topics, each with Lesson, Video and Quiz.

Tap: Lesson

What happens next: The first lesson opens. Read it to the end.

If something goes wrong: If it still does not work, tap "Talk to a person" on the Help page and tell us what you see.

5 Step 5 of 9 **Screen: the tool's name**

How to get there: Lessons for this tool, in the status strip.

What you see: The same seven topics.

Tap: Quiz

Type: Choose one answer for each question.

What happens next: Your mark. 75% is a pass.

If something goes wrong: Under 75%? You have three tries; each try brings new questions.

6 Step 6 of 9 **Screen: the tool's project**

How to get there: Your home screen, then the tool's tile.

What you see: The status strip says "3 of 7 activities done" and one cyan button.

Tap: Next: <the activity>

Type: What was done and when, for example "Asked three suppliers for prices", 12 March.

What happens next: The activity is marked done and the count goes up.

If something goes wrong: If it still does not work, tap "Talk to a person" on the Help page and tell us what you see.

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7 Step 7 of 9 **Screen: the status report**

How to get there: From the project screen.

What you see: Where the work is now, what is overdue and what comes next.

Tap: Send the PDF

What happens next: The status report PDF is sent to you.

If something goes wrong: If it still does not work, tap "Talk to a person" on the Help page and tell us what you see.

8 Step 8 of 9 **Screen: the final report**

How to get there: When every activity is done, the strip says "Your report is ready".

What you see: Whether the project met its objective.

Tap: View

What happens next: The final report opens.

If something goes wrong: If it still does not work, tap "Talk to a person" on the Help page and tell us what you see.

9 Step 9 of 9 **Screen: the final report**

How to get there: The same page.

What you see: A box to type your name to accept the report.

Tap: Send for sign-off

Type: Your full name, as your signature.

What happens next: The report is signed off. A consultant's work is approved by RMK too.

If something goes wrong: The button is missing? Some activities are not done yet. The strip shows how many.

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WORDS EXPLAINED

Project

The piece of work a tool helps you finish, with a start and an end date.

Activity / task

One job, with dates and a person responsible for it.

Status report

A page showing where the project is now and what comes next.

Final report

A page saying whether the project did what it set out to do.

Sign-off

Typing your name to accept the final report. RMK also signs when a consultant did the work.

Quiz / pass mark

75% is a pass, and you get 3 tries.

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