

What to Ask Your Team

Once organizations begin exploring mobile and no-code initiatives, the conversation often moves quickly toward tools.

Which platform should we use?
Should we hire developers or buy a product?
How will we integrate with our existing systems?

These questions are natural.

But they arrive too early.

Before choosing tools or building applications, leadership needs to understand something more fundamental: how the organization intends to capture and move operational truth.

Technology decisions should follow that understanding, not lead it.

The goal is not to eliminate risk. The goal is to make responsibility visible. The questions below help bring those responsibilities into focus.

Where Does Truth First Appear?

Every operational workflow begins somewhere in the real world.

- A technician notices a problem.
- A salesperson identifies an opportunity.
- A manager observes a condition that requires attention.

But the moment when something is first noticed is rarely the moment when the system becomes aware of it.

Ask your team:

- Where does this observation actually occur?
- Who notices it first?
- How long does it take before the system becomes aware of it?

Many organizations discover that their systems only see events long after they happen.

Understanding where truth originates is the first step toward improving timing.

What Should Happen Immediately?

Once an observation is captured, the next question is straightforward:

What should the system do right away?

Not every event needs to trigger a complex workflow. But some observations are meaningful enough that waiting introduces risk or delay.

Ask your team:

- Which observations should trigger action?
- Who needs to know about them?
- What decisions should begin immediately?

These questions help clarify whether a mobile workflow creates genuine operational value or simply adds another layer of convenience.

What Is the System of Record?

Mobile systems are excellent at capturing events quickly. They are rarely the long-term authority for that information in an enterprise system. That responsibility usually belongs to an existing system of record – a CRM, ERP, financial system, or operational database that maintains durable history and integrates into the company overall workflows.

Ask your team:

- Where should the durable record live?
- Which system ultimately owns the truth?
- What information must be preserved for audit or history?

Clarifying the system of record early prevents confusion later.

Mobile capture should feed authoritative systems, not compete with them.

What Happens If Something Goes Wrong?

Traditional applications often assume stable connections and controlled environments.

Mobile workflows operate in the real world.

- Connections fail.
- Users repeat actions.
- Automations retry operations.

Ask your team:

- What happens if an action is triggered twice?
- How will the system respond to incomplete steps?
- Who is responsible for resolving conflicts?
- What if two different mobile users access the same record?

These questions reveal whether the workflow has been designed with real-world conditions in mind.

How Will We Start Small?

One of the most common mistakes organizations make is attempting to build a comprehensive solution immediately.

Successful mobile initiatives usually begin with something far smaller.

Ask your team:

- What single operational problem would benefit from earlier capture?
- Which role would benefit first?
- What small workflow could we test safely?

Starting small allows teams to learn how their systems behave without introducing unnecessary complexity.

The Purpose of These Questions

These questions are not meant to slow progress. They are meant to clarify responsibility.

Mobile systems succeed when organizations understand three things clearly:

- where truth begins
- how it moves
- where it ultimately lives

Once those answers are visible, choosing tools and building workflows becomes far easier.

Architecture follows understanding. And understanding begins with the right questions.

These questions do not produce architecture on their own.

But they reveal something more important: where responsibility actually lives inside a modern operational system. By this I mean how can a mobile initiative completely integrate with your core systems?