
Clearer inputs. Useful outputs. A proper handover.

Five fictional demonstrations of reviewable workflow documents.
Aligned to the XenLabz workbench and focused pilot offer.

01	Notes to action review	2-3
02	Scope change review	4-5
03	Client request workbench	6-7
04	Workflow opportunity brief	8-9
05	Operating guide preview	10-11

Local rules and templates. No customer case studies or measured savings claims. Human review is required; live AI analysis and customer-system integrations are not demonstrated.

INPUT AND COMPLETENESS

Notes to action review

Make the commitments and the gaps visible.

The source notes

L1: Kickoff notes - fictional example
L2: Please send the revised scope; Owner: Alex; Due: Friday
L3: We need to confirm who can approve the access request.
L4: Sam mentioned next week, but no commitment was agreed.
L5: Review the report template; Owner: Jordan; Due: Not agreed

What the rule-based check picked up

Ownership across 3 candidate actions



2 named owners | 1 unclear owner

Timing across the same 3 candidates



1 stated deadline | 1 deadline not agreed | 1 deadline unstated

Counts describe only these fictional notes. Candidate selection is keyword based; explicit Owner: and Due: labels provide the fields. It does not infer intent or confirm commitments.

OUTPUT AND DECISION POINTS

Action review register

Keep the evidence next to the work that needs review.

Source / candidate	Owner	Timing	Review action
L2 / Send revised scope	Alex	Friday	Confirm the commitment and the actual date.
L3 / Confirm access approver	Unclear	Not stated	Identify an accountable owner and deadline.
L5 / Review report template	Jordan	Not agreed	Agree timing before scheduling.

A field can be present without being settled

"Due: Not agreed" is an explicit field, but it is not an agreed deadline. A person must interpret that distinction.

Preserved source evidence

L2: Please send the revised scope; Owner: Alex; Due: Friday

L3: We need to confirm who can approve the access request.

L5: Review the report template; Owner: Jordan; Due: Not agreed

Next human step

Confirm every candidate action, resolve the unassigned access approval, and agree a date before adding work to a task system.

Try the editable example at www.xenlabz.com/workbench.html. Actual system connections and acceptance criteria are agreed separately.

SCOPE AND INCOMING REQUEST

Scope change review

Clarify a request before committing extra work.

Agreed scope line	Source wording
1	Configure one weekly report from an approved spreadsheet.
2	Include one template, test examples, and a handover guide.
3 / exclusion	Exclude CRM integrations and ongoing support.

The new client request

Could you also connect the CRM and provide ongoing support?

Important reading distinction

The shared-word match points to an exclusion. Shared vocabulary is evidence to inspect, not evidence that the request is covered.

Method: compare request vocabulary against the supplied scope. This sample does not decide contractual coverage or identify scope creep automatically.

OUTPUT AND APPROVAL GATE

Change clarification brief

Use the comparison to start a precise scope conversation.

Review finding	Evidence / meaning
Shared-word passage	Scope line 3: Exclude CRM integrations and ongoing support.
Words absent from scope	connect, provide. Wording differences alone do not establish extra work.
Decision still required	Is the request covered, excluded, or a change requiring agreement?

Clarification draft

Thanks for the request. Before confirming it, could we check which agreed deliverable it relates to, the expected result, and whether it changes the work or delivery date? Any change needs written agreement before proceeding.

1

Clarify the requested result

Identify the deliverable and how the request affects the existing scope.

2

Agree any change in writing

Confirm additional work, cost and timing before proceeding.

Review aid only. Different wording can describe the same deliverable; shared wording can describe an exclusion.

INTAKE AND ROUTING

Client request workbench

Capture the request and establish the next review step.

Captured client request

Please add our second business unit to the weekly report. The current report only covers the original team. We need to agree who owns the new inputs.

Reported impact: planned improvement

Work blocked
Service owner / escalation review

Work slowed
Delivery owner / next review

Planned improvement
Delivery owner / planned review

SELECTED INPUT

Routing follows the impact selected by the visitor, not an interpretation of the request. No ticket was created or message sent.

OUTPUT READY FOR APPROVAL

Client response and review

Acknowledge the request without promising scope or timing.

Acknowledgement draft

Thanks for the request. We will review the details below before confirming scope or timing: Please add our second business unit to the weekly report. The current report only covers the original team. We need to agree who owns the new inputs.

Please confirm the owner, requested completion date, and expected result. Receipt is not acceptance or a delivery commitment.

Before accepting	What to establish
Ownership	Who owns the affected process and can approve the work?
Timing and impact	What date is requested and what is the actual business impact?
Completion	What observable result counts as complete?
Access and scope	Are extra permissions or a written scope change required?

Next human step

Identify the new business-unit owner, expected reporting outcome, actual deadline, and whether scope or access changes are required.

Try the editable example at www.xenlabz.com/workbench.html. Actual system connections and acceptance criteria are agreed separately.

OPPORTUNITY AND PROCESS MAP

Workflow opportunity brief

Define the process before buying a solution.

Starting problem: Every Friday we collect project updates by email and manually assemble a client report.

Proposed sequence / human approval is explicit

- 1 Collect approved inputs**
Use email as the proposed source; agree the actual trigger and permissions.
- 2 Check required fields**
Return incomplete items to the process owner rather than inventing data.
- 3 Prepare the report**
Apply the agreed rules or templates to the approved inputs.
- 4 Human review gate**
A named person checks accuracy and authorizes release.
- 5 Release and record**
Use the agreed destination; record failed or incomplete runs.

Illustrative process based on the selected inputs. Tool compatibility, implementation effort and expected savings have not been assessed.

PROPOSED ACCEPTANCE EXAMPLES

Fit review and test plan

Turn the process outline into something the customer can approve.

Proposed case	Expected review behavior
Normal input	Prepare the agreed report structure from complete, approved updates.
Missing update	Flag the missing information and route it back to the owner.
Review not complete	Keep the result as a draft; do not release it.
Destination unavailable	Keep the approved draft and record the failure for recovery.

These are proposed tests, not recorded passes

The cases above are illustrative acceptance examples for discussion. Actual customer criteria, configuration and test evidence must be agreed and produced during delivery.

Discovery questions

Which tools and licenses already exist? Who grants access? How often does the task run? Which examples define success? Who owns approvals and recovery? Can one bounded process fit a six-hour pilot?

Next human step

Provide redacted representative updates and name the process owner. Confirm tools, access, acceptance examples, and whether a six-hour pilot is realistic.

Try the editable example at www.xenlabz.com/workbench.html. Actual system connections and acceptance criteria are agreed separately.

OPERATING MODEL AND NORMAL RUN

Operating guide preview

Show the team how to run, review, and recover.

Role	Responsibility in this fictional workflow
Process owner	Collect approved updates and resolve missing fields.
Named reviewer	Check accuracy and authorize release.
Operator	Follow the guide, record completion and escalate exceptions.

Normal weekly run

1 Collect
Gather the approved project updates by the agreed cutoff.

2 Validate
Check project, owner, date, status, update and blocker fields.

3 Prepare
Create the report and inspect every warning.

4 Review
The named reviewer checks accuracy and approves release.

5 Publish
Use the agreed destination and record completion.

DECISION PATHS AND HANDOVER CHECKS

Exception and recovery guide

Make the failure path as clear as the normal path.

When the input or destination is not ready



Do not replace missing evidence with a reassuring status

Missing information must not become an invented "on track" update. An unsuccessful publish must not become a completed run.

Handover rehearsal checklist

- ☐ Name the process owner and reviewer.
- ☐ Identify the approved inputs and destination.
- ☐ Explain the release approval step.
- ☐ Rehearse a missing-input and failed-publish case.

Actual owners, access and recovery procedures must be tailored to the customer workflow. These unchecked items are a sample rehearsal, not a completed acceptance record.