

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.