FICTIONAL SAMPLE ASSESSMENT

From enquiry to a clear next action

A fictional Miami service team receives project enquiries by email, records them in a spreadsheet, and shares work between an enquiry owner and a delivery lead.

The boundary

One team. The workflow begins when an enquiry arrives and ends when the delivery lead accepts a scoped handoff or the enquiry is closed.

The process map

Current workflow - fictional	Proposed workflow
01 Enquiry arrives in a shared mailbox	**01** Owner reviews the enquiry and records the source
02 Owner copies details into a spreadsheet	**02** Owner sets status, next action, and due date
03 Follow-up sits in an email thread	**03** Team reviews a short scope and acceptance checklist
04 Delivery lead asks for missing scope details	**04** Delivery lead accepts the handoff or returns it for clarification

Three priorities

1. Next actions have no consistent owner or due date.
Give each open enquiry one accountable owner, next action, and due date.

2. A handoff can happen before the scope is complete.
Require an objective, exclusions, acceptance criteria, and an explicit receiving owner.

3. The team has no agreed baseline for the workflow.
Define the measures first, then record a baseline before implementation.

All people, workflow observations, findings, and recommendations in this sample are fictional. Measures are proposed definitions, not measured savings, achieved improvements, or customer results. No real customer records are included.

A scoped next step

The implementation brief

Objective

Make ownership and the next action visible from first review through delivery handoff.

Proposed scope

One enquiry list with an owner, status, next action, due date, and an agreed handoff checklist for one team.

Acceptance criteria

An open enquiry can be assigned an owner and due date. A handoff cannot be marked accepted until its required scope fields are complete. The receiving owner can accept it or return it with a reason.

Dependencies

A named workflow owner, agreed status definitions, approved tools and data rights, and team availability for review. Customer-data access requires a separate readiness decision.

Exclusions

Bulk email, payment collection, customer accounts, historic data migration, external integrations, and live customer-data activation.

Delivery decisions

Confirm the useful scope, effort, fee, review milestones, and acceptance in a separate written proposal before building. No implementation is included in the assessment fee.

Agree how to measure it

Ownership coverage. Open enquiries with an owner and next-action date divided by all open enquiries.

Time to first review. Elapsed time from enquiry receipt to its first recorded human review. Compare equivalent working periods.

Handoff completeness. Handoffs accepted without clarification divided by reviewed handoffs in the same period.

These are proposed definitions. Establish a baseline before implementation; no target or achieved improvement is claimed.

Discuss your own workflow

The $750 assessment covers one team and one workflow: a 60-minute discovery session, process map, priorities, scoped implementation brief, and handover. Delivery is within five business days after discovery and receipt of agreed inputs. Scope, schedule and payment terms require a separate written agreement. Implementation is quoted separately.

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