

ALTERNATE MACHINES / WORKFLOW DECISION / £950

Workflow Decision

One repeated process examined before you pay for implementation. The answer may be a current feature, a small change, a Controlled Workflow Build or no build.

FICTIONAL SAMPLE / NO CLIENT DATA / FORMAT, NOT RESULTS

PRICE £950	NORMAL TIMING Normally within five working days of complete inputs
EXAMPLE BUSINESS Invented UK service business	EXAMPLE TASK One client-onboarding process
VERSION 1.1 / plain-English review 5 August 2026	STATUS Fictional sample; not a client result

01 / MAP See where one repeated task gets stuck.	02 / CHECK Test what your existing software can do.	03 / DECIDE Choose a small change, build or no build.	04 / HAND OVER Receive the reasons in writing.
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READ THIS FIRST

This is a fictional sample showing format and level of detail. It is not a client result, certification, independent audit or promise of an outcome. This PDF is untagged; use the accessible website reading version where available.

£950

FIELD NOTE

Buy the decision before the build.

One process / one written answer / implementation not included.

01 / DECISION SNAPSHOT

One paid decision. Four honest routes.

The Workflow Decision is useful only if it can recommend the smallest sensible response. It does not assume that custom automation is the answer.

01 Use what you own Use a current feature when it solves the agreed problem. ROUTE A	02 Change the process Clarify required information, ownership and returns. SAMPLE CHOICE	03 Build one controlled improvement Only when current tools cannot meet the need. ROUTE C	04 Do not build Stop when value or feasibility is weak. ROUTE D
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QUESTION	ANSWER IN THIS FICTIONAL EXAMPLE
What task?	Move accepted client work into onboarding, then accept or return the information.
What goes wrong?	Required information is missing or cannot be matched to the accepted work.
Which software?	Example CRM and Microsoft 365 features. Real connections and permissions are not tested here.
Who decides?	The client-service lead keeps approval. Professional advice, regulated decisions, identity checks, payments and sensitive-record review stay with authorised people.

SAMPLE WRITTEN ANSWER	Make the smallest useful process change first. Recommend a Controlled Workflow Build only if the current software cannot show the task, missing information and human approval clearly.
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02 / HOW THE WORK MOVES

Missing information returns to a person. Not a dead end.

Every step has one person responsible and one visible next action. A sent message or silence never counts as approval.

01	Work accepted	An authorised person records that the new work has been accepted.	COMMERCIAL LEAD
02	Task created	One onboarding task shows the person responsible and the due date.	CLIENT-SERVICE LEAD
03	Information checked	Required information is checked; unusual cases still need a person's judgement.	CLIENT-SERVICE LEAD
04	Missing item returned	The person responsible sees what is missing, why it matters and what to do next.	MISSING-ITEM OWNER
05	Person approves	The client-service lead approves the work to continue or sends it back.	CLIENT-SERVICE LEAD
06	Outcome recorded	The decision, missing items and next person responsible are recorded.	PROJECT LEAD

WHEN SOFTWARE OR A
SUPPLIER STOPS
WORKING

The task pauses, keeps the last confirmed information and shows the agreed manual way to continue. It never says the work succeeded when it did not.

01	Information complete? Technology highlights gaps. A person judges unusual information. HUMAN DECISION	02	Can work continue? Technology shows the record. A named person approves. HUMAN DECISION	03	Should the process change? Technology records evidence. The process owner decides. HUMAN DECISION
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03 / CHECK BEFORE BUILD

Check what you own before paying for custom work.

The first choice is not the most impressive technology. It is the smallest change that solves the agreed problem safely.

01

Current software feature

Can an existing field, list, task, approval or reminder solve the problem?

CHECK FIRST

02

Small process change

Can clearer required information and one person responsible make the work reliable?

SAMPLE CHOICE

03

Controlled Workflow Build

Is a defined build needed across up to two eligible systems?

SEPARATE PROPOSAL

04

No build

Does the checked value or feasibility fail to justify implementation?

VALID ANSWER

WHAT WE CHECK	WHAT WE NEED TO SEE
Customer or CRM record	Settings, permissions and an authorised test record.
Person responsible	A visible owner, due date and route for missing information.
Microsoft 365	Available lists, tasks or approvals and the relevant permissions.
Reminders	The message, what starts it and what happens when it fails.
Manual back-up	Written steps and the person responsible when software is unavailable.

WHAT THE £950
WORKFLOW DECISION
BUYS

A process map, current-software check and written decision. It does not include implementation, live-system access or a promise of financial return.

04 / MEASUREMENT PLAN

Measure before. Change one thing. Measure again.

A real result needs the same definition and source before and after the change. This fictional sample has no real performance figures.

BEFORE

CHANGE

AFTER

Measure the current task. This is the baseline.

Make the agreed change and record what moved.

Measure the same work in the same way.

01

Main measure

Time from authorised acceptance to the onboarding information being accepted or returned.

02

Source

CRM history and the agreed onboarding record.

03

Before the change

Measure the current task before changing anything.

04

After the change

Use the same type of work, source and definition.

05

How results are shown

Show the middle result, range, record count and exclusions.

06

What else can affect it

Information quality, staffing, work type and client response time.

BEFORE PUBLISHING A RESULT

Show the before figure, after figure, dates, number of records, calculation and anything important that may have affected the result.

05 / ILLUSTRATIVE ARITHMETIC

Keep every assumption visible.

The figures below are invented only to show the calculation. They are not a measured saving, forecast, client result or promise of financial return.

MONTHLY CASES

160

Invented client estimate.

INCOMPLETE FIRST TIME

35%

56 fictional cases.

CHASING EACH CASE

12 min

Invented time estimate.

POSSIBLY AVOIDED

50%-75%

Illustrative range only.

5.6-8.4

ILLUSTRATIVE HOURS PER MONTH

VISIBLE CALCULATION

$160 \times 35\% \times 12 \text{ minutes} \times 50\%-75\% / 60 = 5.6-8.4 \text{ hours per month.}$

Arithmetic from invented assumptions. No cash saving or return is claimed.

01

Check every input

Record where each figure came from, the period and how reliable it is.

SOURCE

02

Stop when value is weak

Recommend no build when the checked estimate does not justify the cost.

DECISION

03

Do not invent ROI

A time estimate is not a cash or return-on-investment claim without separate evidence.

BOUNDARY

Fictional assumptions / visible arithmetic / no promised saving

06 / TEST, HAND OVER, DECIDE

Agree what 'working properly' means in writing.

A finished-looking screen is not proof. Each important situation has a clear test, expected behaviour and record.

01

All information present

Create one task with a named person and due date.

PASS / RECORD VISIBLE

02

Information missing

Do not continue; show the reason, person responsible and next action.

PASS / OWNER RECORDED

03

Approval required

Do not continue without clear approval from the named person.

PASS / APPROVER + TIME

04

Software unavailable

Pause, keep the last confirmed information and show manual steps.

PASS / NO FALSE SUCCESS

What your Workflow Decision report contains

01

What happens now

Start, finish, responsibility, common failure and what is outside the Workflow Decision.

02

Suggested process

Steps, human decisions, software failure and manual back-up.

03

Current-software check

Features you own are reviewed before custom work is recommended.

04

Written recommendation

Build, make a small change or do not build, with reasons.

05

Measurement plan

Measure, source, dates, calculation and important limitations.

06

Assumptions and questions

Anything untested, uncertain or still needing an answer.

NEXT ACTION

The Workflow Decision may end with no build. If a Controlled Workflow Build is recommended, it is separately scoped, priced, accepted and tested.