Evaluate with confidence. Start with the facts.

Evaluation & implementation pack

A working guide for product, operations and consulting teams preparing a focused ProcessScout evaluation or first project.

USE THE PACK IN THREE CONVERSATIONS

01 **Is there a useful fit?**

Choose a product or process decision; identify evidence and open questions.

02 **Can the work proceed responsibly?**

Review data, access, participants, acceptance and ongoing ownership.

03 **What would justify the next step?**

Agree measurement and record a conditional decision.

General templates, not certified controls, service levels, guaranteed outcomes or an implementation contract. Confirm applicable service facts and agree commitments separately.

01 / EVALUATION QUESTIONS

Make the requirement answerable.

Begin with a product decision or process workflow worth improving. Record the evidence needed to resolve each question, who can decide and what remains open.

AREA	QUESTION TO RESOLVE	EVIDENCE TO INSPECT
Fit	Which product decision or process workflow is in scope?	A scope, product or process owner, and key exclusions.
Data	Which source categories and processing requirements apply?	An inventory, a representative sample and processing details.
Access	Who needs to view, edit, review and approve?	Configured permissions and each participant's actual view.
Integration	Which objects and read or write operations are needed?	Supported scope and a representative acceptance test.
Delivery	Who accepts and maintains the output?	Acceptance criteria, handover and named owners.
Value & exit	How will we measure change and leave the project?	A measurement plan, export needs and retention requirements.

CHOOSE THE STARTING POINT

A product: connect a customer request, goal, priority and roadmap. Product can start without a process assessment or repository. A workbook: inspect values, formulas and rules. A process: connect evidence, handoffs and dependencies. A defined change: review a scoped delivery route. Build Factory is an optional beta connection; setup and scope need review.

Working status vocabulary: To discuss / Evidence requested / Reviewed / Unresolved. A reviewed item is not automatically approved. Use evaluation-questions.csv to assign owners and record status.

02 / EVIDENCE INVENTORY

Bring context, not a perfect dataset.

Use representative, authorized evidence. Preserve its provenance and limits so that a clean sample does not create false confidence.

01 **Start with the question**

Choose material that explains the decision: customer requests and product goals, workbook sheets, a process document, a record sample or a focused walkthrough. Keep the sample bounded.

02 **Record what the sample represents**

Capture the source owner, version, format, period, selection method and intended purpose. Include one normal path and a meaningful exception where possible.

03 **Prepare and authorize**

Identify sensitive fields, remove unnecessary identifiers and inspect the prepared copy. Record who authorized access, the permitted audience and any usage restrictions.

FICTIONAL INVENTORY EXAMPLE

Source: engagement-handoff.csv | Owner: process owner to identify | Sample: five normal cases and two exceptions | Purpose: explain missing handoff information | Preparation: remove client identifiers | Gap: does not represent seasonal peaks.

RECORD FOR EVERY SOURCE

Source / owner / format / period or sample / purpose / sensitive fields / preparation needed / access approval / known gaps

Keep the source identifier with findings and decisions. Record contradictions and missing evidence as open questions. Use evidence-inventory.csv for the full register.

03 / DATA & ACCESS

Follow the evidence across boundaries.

These are review prompts, not claims that a particular control is available. Check the applicable service facts and your intended configuration before sharing sensitive material.

Collect	What source categories are necessary? Who owns them and authorizes their use? What must be removed or masked before intake?
Process	Which source or project context can be sent for AI analysis? Which provider handles the feature, under what terms and in which processing locations?
Review	Who can view, edit, comment and approve? Inspect workspace membership, project access and the version associated with a decision.
Share	Which audience receives which artifact and version? Confirm the sharing method, access removal and any customer-configured connection credentials.
Retain & exit	What happens to files, extracted content, outputs, logs and backups? Agree exports, completeness checks, retention requirements and deletion questions.

ACCESS REVIEW RECORD

Participant and purpose: _____
Permitted actions and project scope: _____
Evidence inspected / reviewer / unresolved requirement: _____

Use the current Security & data page and Privacy Policy for published facts. Discuss any requirement needing a contractual commitment before supplying material.
processscout.com/security / **processscout.com/processscout-privacy.html**

04 / FIRST-PROJECT SEQUENCE

Five stages. A decision at each one.

Use this sequence as a discussion framework. Scope, timing, deliverables and any implementation or support involvement must be agreed separately.

01	**Frame**	Agree the product or process boundary, intended decision, accountable owner and exclusions. **Useful output:** One-page scope and acceptance criteria.
02	**Understand**	Review customer demand or process evidence, goals, dependencies and unknowns. **Useful output:** Cited needs or current state; evidence register.
03	**Decide**	Compare options, goal alignment, effort and risk. Record the priority, horizon and assumptions. **Useful output:** Decision brief with conditions for proceeding.
04	**Prepare / deliver**	Agree the scope, checks and release conditions. Review optional Build Factory beta setup where relevant. **Useful output:** Reviewed plan or accepted delivery evidence.
05	**Learn**	Check adoption, exceptions and the agreed measures. Review what the evidence supports. **Useful output:** Measurement review and the next decision.

FICTIONAL PRODUCT STARTING PATH

Harbor: RQ-184 (external review) -> GOAL-12 (reduce review delays) -> SPEC-31 (bounded sharing) -> Next (proposed work) -> a planned manual release. Baseline and outcome are unknown. No process assessment or repository is needed to start; Build Factory is optional beta.

05 / RESPONSIBILITIES & ACCEPTANCE

Agree who decides, reviews and owns.

Assign named people to the roles below. The product can organize evidence and help produce reviewable work; operational context, acceptance and adoption still need accountable people.

Product / process owner	Defines goals and scope; connects customer needs or process evidence; validates the decisions.
Reviewers	Inspect sources, challenge assumptions and review the output against agreed criteria.
Technical / data owner	Confirms permissions, processing requirements, connections and implementation environment.
Agreed delivery team	Prepares scoped deliverables, exposes open questions and supplies acceptance evidence.
Ongoing owner	Receives the handover, owns adoption and maintenance, and reviews measures.

WRITE CRITERIA SOMEONE CAN INSPECT

For a product spec or process map: each claim links to a source; requirements or exception paths are visible; assumptions are labeled; the product or process owner records acceptance against a dated version. This is a criterion example, not completed validation.

ACCEPTANCE & HANDOVER RECORD

Deliverable and version: _____ Accountable acceptor: _____

Required checks / acceptance evidence: _____

Open conditions / ongoing owner / training or support needs: _____

Use responsibility-matrix.csv to assign accountability and contribution for each activity. Agree any ProcessScout support or implementation involvement separately.

06 / MEASUREMENT PLAN

Baseline. Target. Observed result.

Define a measure before claiming improvement. A target is an intention; an observed change needs a source, period and explanation of its limitations.

BASELINE

The starting value, period, source and sample. Record how the measure was collected and whether the period is representative.

TARGET

The desired value and its rationale. Capture assumptions, constraints and who agreed it. A forecast is not an observed result.

OBSERVED

The later value, period and sample. Compare equivalent definitions and record adoption, other changes and uncertainty.

FICTIONAL MEASURE DEFINITION

Handoff completeness rate = accepted handoffs containing all agreed required information / all handoffs reviewed. Use the same checklist, sampling rule and definition of acceptance in each period. No baseline or result is asserted here.

MEASURE / UNIT / SOURCE / OWNER

What exactly is counted, from which record, by whom?

BASELINE / TARGET / OBSERVED

Record values and periods separately; leave unknown readings unclaimed.

LIMITATIONS / INTERPRETATION

What changed in volume, mix, adoption or collection? What else could explain the result?

SEPARATE TYPES OF VALUE

Time released is capacity. Applying a cost rate estimates capacity value. Cash savings require evidence that expenditure actually changed. Avoid double counting and record assumptions in measurement-plan.csv.

07 / DECISION & NEXT CONVERSATION

Leave with a decision you can explain.

Complete this brief with colleagues. Use it to proceed with conditions, request more evidence, narrow the scope or stop. The worksheet itself is not an approval.

QUESTION & BOUNDARY

Product or process question, goal, decision, owner, scope and exclusions.

EVIDENCE & CURRENT UNDERSTANDING

Sources and periods inspected; what they support; gaps and contradictions.

OPTIONS & PROPOSED DIRECTION

Alternatives, effort basis, dependencies, risks and why one direction is suitable.

CONDITIONS BEFORE PROCEEDING

Data/access questions, acceptance criteria, responsibilities and measurement still to agree.

NEXT CONVERSATION

Bring the product or process question, an authorized sample and the colleagues who can review it. Name the requirements that could prevent a useful first project.

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REVIEW RECORD

Version: _____ Reviewed by: _____ Date: _____

Decision and conditions: _____

Next evidence / accountable owner / next review to agree: _____

Continue in decision-brief.md and first-project-plan.md. The companion CSV templates hold the detailed question, evidence, responsibility and measurement registers.