AN EXAMPLE TRAIL MAP

The work, *made clear.*

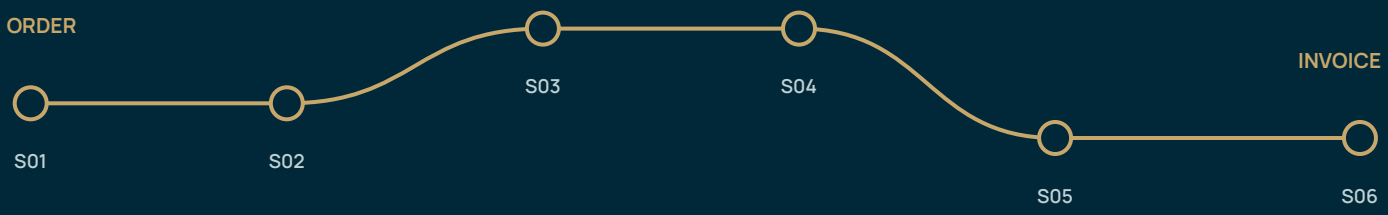
A Trail Map from the customer order to the next decision.

Northwind Supply Co.

A fictional US distributor. Example company size: 80 people.

WORKFLOW REVIEWED

Order to invoice



An authored example, not a client engagement. All company details, records, observations and operational figures are fictional examples. Proposed effects are hypotheses to test, not achieved results. No analyst sign-off is claimed for this sample.

Read the interactive Trail Map

YOUR ROUTE THROUGH THE REPORT

Follow the trail.

Read the decision first, follow the current trail, inspect the evidence behind each opportunity, then use the plan and starter checklist to shape a first pilot.

01 The decision — 03
An owned, bounded first move

02 The current trail — 04
Scope, people, systems and baseline

03 One order, traced — 07
Source, interpretation and hypothesis

04 Three opportunities — 08
Evidence, effect models and pilot gates

05 The next 90 days — 14
Sequencing, ownership and decisions

06 Use the work — 17
Measures and a practical starter asset

07 Limits and method — 19
What remains open; how a paid review works

08 Sources and next step — 21
Inspect the records; commission your own

Source badges link to the evidence register. Every operational figure is an example.

01 / EXECUTIVE DECISION

Fix the handoffs. Then connect the systems.

In this example, the order travels through familiar tools. The difficulty sits between them: incomplete order details, an unclear invoice-ready handoff and repeated entry of the same information. The first move is to make the work complete and owned. Only then is a small integration worth testing.

RECOMMENDED NEXT MOVE

Authorize a bounded pilot with a process owner, a baseline and a stop rule. Keep credit approval and invoice release under human control.

WHY THIS DECISION

The example evidence points to specific places to investigate. It does not establish what would happen after a change. Each recommendation therefore includes the evidence, a competing explanation and a measurement gate.

WHAT IS NOT JUSTIFIED YET

Do not approve a broad system replacement, book a financial saving or extrapolate these figures to the whole business. Cash collection, purchasing and non-stock orders are outside this review.

02 / WORKFLOW REVIEWED

One workflow. A deliberate boundary.

One workflow: standard stocked business orders, from receipt of a customer purchase order to issuance of the invoice. This is the order-to-invoice portion of order-to-cash.

INSIDE THE REVIEW

- One example legal entity and one distribution business unit.
- Standard stocked B2B orders with a completed invoice in the example cohort.
- Order completeness, internal release, fulfillment confirmation, invoice preparation and issuance.
- The roles, systems, handoffs, rework and manual entry within that boundary.

OUTSIDE THE REVIEW

- Cash receipt, collection activity, days sales outstanding and bad debt.
- Supplier purchasing, demand forecasting, returns and non-stock or bespoke orders.
- Credit-policy redesign, tax advice, regulatory assurance and production implementation.
- Claims about company-wide savings, headcount reduction or customer outcomes.

EXAMPLE EVIDENCE WINDOW

Example review window: four working weeks. The synthetic cohort contains 100 completed orders. Open, canceled and returned orders are excluded, so this sample cannot describe backlog or overall service performance.

THREE QUESTIONS GUIDE THE REVIEW

- Is the order complete before it reaches release?
- What exactly makes a dispatched order ready to invoice?
- Which information is entered again, by whom and why?

The sources are constructed to make the reasoning inspectable. They are not a statistical sample, independent corroboration or evidence about an actual company. A paid assessment replaces every example with the evidence your team authorizes.

02 / CURRENT-STATE MAP

The order changes hands.

EXAMPLE WORKFLOW / Read from top to bottom

1

S01 Receive the order

Read the request and record its arrival. A standard completeness check is not yet part of this example procedure.

Customer service

Shared order mailbox

In: Customer purchase order

Out: Order request in the intake queue

E01 / E05

2

S02 Validate and enter

Check the account, ship-to, item, quantity and agreed price. Missing information creates a clarification loop before release.

Customer service

ERP order screen + price sheet

In: Order request

Out: Entered order, with missing details chased

E01 / E02 / E03

3

S03 Approve release

Apply the existing credit policy. The proposed changes preserve this approval and its audit trail.

Credit controller

ERP credit queue

In: Entered order

Out: Approved release or a recorded hold

E01 / E05

4

S04 Pick and dispatch

Pick, pack and dispatch the stocked items. Physical fulfillment remains inside the measured trail but is not the target of these opportunities.

Warehouse team

Warehouse system

In: Released order

Out: Dispatch record and shipment reference

E01 / E05

5

S05 Match the dispatch

Match the shipment to the order. The example spreadsheet does not consistently identify who owns an unmatched dispatch.

Accounts receivable

Dispatch spreadsheet + ERP

In: Dispatch record

Out: Invoice-ready order or assigned exception

E01 / E04 / E05

6

S06 Prepare and issue

Prepare the invoice, check it and issue it. Some fields are manually entered again. Cash collection starts after this review ends.

Accounts receivable

ERP invoice screen

In: Matched order and dispatch

Out: Issued invoice with a recorded timestamp

E01 / E03

02 / BASELINE

A baseline you can inspect.

All figures below are examples. They are not customer results.

EXAMPLE BASELINE M01

16.4 business hours

Mean order-to-invoice time

Sum of elapsed business-clock hours across the completed order cohort, divided by completed orders. Stage times include both work and waiting; they are not labor hours.

1,640 business hours / 100 orders = 16.4 business hours per order.

An example eight-hour working day is used to construct the durations. No calendar-time or on-time-delivery claim follows.

Source E01

EXAMPLE BASELINE M02

25% of example orders

Orders needing clarification

Orders with at least one missing required field that triggers a clarification loop. An order is counted once even if several fields are missing.

25 affected orders / 100 orders = 25%.

This measures order-completeness rework only. It is not the total error rate across the business.

Source E02

EXAMPLE BASELINE M03

6.5 manual touches / order

Hands-on interventions

One deliberate human intervention at each of the six steps, plus two extra interventions on each order needing clarification. A touch is not a person or a handoff.

(100 orders x 6 touches + 25 orders x 2 extra touches) / 100 = 6.5.

The example has three planned role handoffs: customer service to credit, credit to warehouse, and warehouse to accounts receivable.

Source E01

EXAMPLE BASELINE M04

12 minutes / walkthrough

Order and invoice entry

Mean manual entry time at S02 plus S06 in five authored walkthroughs. The mean is eight minutes at order entry and four at invoice entry. Existing approval activity is separate.

(12 + 12 + 12 + 12 + 12) minutes / 5 walkthroughs = 12 minutes.

A deliberately small example. Validate task timing, exception coverage and field-level necessity before using it to size a change.

Source E03

03 / WORKED RECORD

Follow one order through the evidence.

NW-028

Example order NW-028 needs a ship-to clarification at S02. Its dispatch later reaches S05 without a named match owner. The two exceptions occur on the same order; this does not prove that one causes the other.

EXAMPLE STAGE BUSINESS HOURS / THE SAME ORDER THROUGHOUT



S01	S02	S03	S04	S05	S06
Example: 0.5 h	Example: 5 h	Example: 1 h	Example: 8 h	Example: 6 h	Example: 1.5 h
Mean: 0.5 h	Mean: 2 h	Mean: 1 h	Mean: 8 h	Mean: 3.4 h	Mean: 1.5 h

EVERY MEAN ABOVE IS ALSO AN EXAMPLE; SOURCE E01

22 Example business hours

8 Example touches

AUTHORED EXAMPLE SOURCES E01 E02 E04

The example makes the distinction visible: a record establishes what was recorded, an interpretation suggests what to investigate, and a pilot tests whether a change helps.

HYPOTHESIS TO TEST

Would the delay remain if the order arrived complete and the invoice-ready exception had an owner? The sample cannot answer that. The pilot can test it.

OPPORTUNITY 01 / EVIDENCE TO OPPORTUNITY

Make the order complete at the start.

01

PROPOSED OWNER

Customer service lead

EFFORT

Low

START HERE

E01 E02 E05

SOURCE EVIDENCE

Example: 25 of 100 orders need a clarification loop at S02. The field audit names the missing item on each affected order. The procedure has no consistent intake completeness gate.

WHAT CHANGES

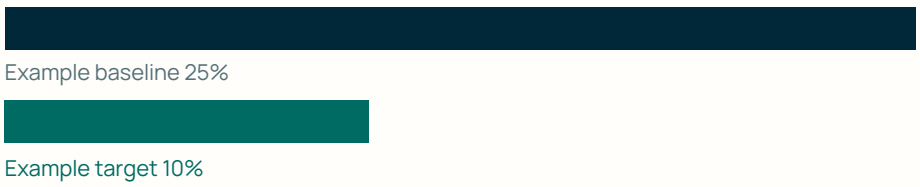
Introduce a short intake checklist for the purchase-order reference, account, ship-to, item, quantity and agreed price. Give incomplete orders an explicit status and a named resolver before release. Keep the original request attached.

WHY THIS IS WORTH TESTING

Move the completeness decision to the point where the missing detail can be resolved. Use one shared definition of ready rather than asking downstream roles to rediscover the same gap.

EXAMPLE PILOT TARGET

Clarification rate



Example pilot target: reduce clarification from 25% to 10% of eligible orders. That is a 15-percentage-point reduction, or 15 fewer clarification loops per 100 comparable orders. It is a test target, not a forecast.

Workflow steps S01 / S02

OPPORTUNITY 01 / TEST THE CHANGE

A bounded pilot. A clear decision.

01

PROPOSED OWNER

Customer service lead

EFFORT

Low

EXAMPLE EFFECT MODEL

100 comparable orders x (25% - 10%) = 15 fewer affected orders. Do not turn this into a cash saving without timing and financial evidence.

CONFIDENCE AND COMPETING EXPLANATIONS

The example field audit supports the existence of the missing fields. It does not prove that a checklist would prevent them. Customer input quality and time pressure could still dominate.

DEPENDENCIES BEFORE THE PILOT

- Agree required fields and valid exceptions with the process owner.
- Keep a human route for urgent orders; record who authorizes the exception.
- Have the ERP owner confirm that a status or checklist can be added without changing release permissions.

TEST AND STOP RULE

Example pilot: inspect 50 eligible orders using the new checklist. Target no more than five clarification loops, with every override authorized and recorded. Review entry effort as well as rework; stop if valid urgent orders are blocked.

DECISION GATE

Adopt only if completeness improves without an unacceptable intake burden. If the upstream source is the issue, redesign the request with customers before adding more controls.

PLANNING ALLOWANCE

Example planning allowance: two person-days across process design, configuration and pilot preparation. Excludes implementation fees; confirm after scope review.

OPPORTUNITY 02 / EVIDENCE TO OPPORTUNITY

Give every invoice-ready exception an owner.

02

PROPOSED OWNER

Accounts receivable lead

EFFORT

Low

PILOT NEXT

E01 E04 E05

SOURCE EVIDENCE

Example: 35 of 100 dispatch records lack a named match owner. Their S05 interval is six business hours, compared with two for the other 65 records. These groups differ by construction; the association is not a causal result.

WHAT CHANGES

Create one invoice-ready queue with order ID, dispatch reference, readiness status, exception reason, owner and next review time. Route unmatched items to a named resolver. Keep invoice issuance subject to the existing checks.

WHY THIS IS WORTH TESTING

A shared list becomes useful when the next action is explicit. The queue should distinguish a genuine data exception from an item that is simply waiting for someone to pick it up.

EXAMPLE SCENARIO

S05 interval / eligible subgroup



Example scenario: if the 35 qualifying records move from six to two business hours at S05, mean order-to-invoice time falls by 1.4 business hours per order. This is elapsed-time reduction, not labor capacity or earlier cash collection.

Workflow steps S04 / S05 / S06

OPPORTUNITY 02 / TEST THE CHANGE

A bounded pilot. A clear decision.

02

PROPOSED OWNER

Accounts receivable lead

EFFORT

Low

EXAMPLE EFFECT MODEL

35 records x (6 - 2) business hours / 100 orders = 1.4 business hours less per order. The example mean would move from 16.4 to 15.0 business hours if every other stage stayed unchanged.

CONFIDENCE AND COMPETING EXPLANATIONS

The example queue links missing ownership with a longer interval. Batching, shipment complexity or staffing could explain the difference. Check those explanations before attributing a pilot result to ownership.

DEPENDENCIES BEFORE THE PILOT

- Agree the dispatch event that starts the invoice-ready clock.
- Define queue ownership, backup coverage and an escalation route.
- Reconcile queue records to the ERP; do not let the spreadsheet become a separate invoice ledger.

TEST AND STOP RULE

Example pilot: use a comparable 100-order cohort and review eligible unmatched records separately. Target a mean S05 interval of two business hours for that subgroup. Track invoice corrections and unresolved items so speed does not hide quality loss.

DECISION GATE

Retain the queue if ownership becomes dependable and delays improve without extra corrections. If batching is the real constraint, change the release cadence only with finance approval.

PLANNING ALLOWANCE

Example planning allowance: two person-days to define statuses, establish ownership and prepare the pilot. A system integration is not assumed.

OPPORTUNITY 03 / EVIDENCE TO OPPORTUNITY

Carry approved information forward.

03

PROPOSED OWNER

ERP owner + finance lead

EFFORT

Medium

PROVE FEASIBILITY FIRST

E03 E05

SOURCE EVIDENCE

Example: each of five authored walkthroughs contains twelve minutes of order and invoice entry. Field-level notes show the order ID, item, quantity and agreed price being carried between the same two screens.

WHAT CHANGES

Test a small, supported field mapping from the approved order to a draft invoice. Show discrepancies for review, retain the original values and require a person to approve issuance. Start with a dry run and a reversible mapping.

WHY THIS IS WORTH TESTING

Reuse information only after the order-completeness and invoice-ready definitions are stable. Otherwise the integration can move incomplete or ambiguous data faster.

EXAMPLE SCENARIO

Order and invoice entry / comparable order



Example scenario: keep mean order entry at eight minutes and reduce invoice entry from four to one minute. Total entry time would move from twelve to nine minutes. Across 100 comparable orders, that would release five hours of task capacity. No cash saving, staffing reduction or payback is claimed.

Workflow steps S02 / S06

OPPORTUNITY 03 / TEST THE CHANGE

A bounded pilot. A clear decision.

03

PROPOSED OWNER

ERP owner + finance lead

EFFORT

Medium

EXAMPLE EFFECT MODEL

100 orders x (12 - 9) minutes / 60 = 5 hours. Assumes S02 remains at eight minutes, S06 moves from four to one, existing review effort stays unchanged and every eligible order uses the mapping. Excludes exceptions, setup, support and adoption time. Do not add this to the other opportunities.

CONFIDENCE AND COMPETING EXPLANATIONS

The example timing is too small to establish a dependable business case. Supported interfaces, source quality and exception frequency remain unverified. The first decision is technical feasibility, not rollout.

DEPENDENCIES BEFORE THE PILOT

- Confirm a supported import or API and the permissions needed to create drafts.
- Agree field mapping, duplicate detection, tax and price handling with finance.
- Define a reconciliation report, rollback and manual fallback before a live pilot.

TEST AND STOP RULE

Example pilot gate: reconcile 50 draft invoices against approved orders with no material field mismatches or duplicate drafts. Target a mean of nine minutes for order plus invoice entry while keeping approval intact. Stop on an unexplained reconciliation difference.

DECISION GATE

Proceed only after the reconciliation and review gates pass. If the interface is unsuitable, retain the manual process and improve its checklist; do not build an uncontrolled workaround.

PLANNING ALLOWANCE

Example planning allowance: five person-days for feasibility, mapping, validation and pilot preparation. Integration and support costs require a separate quote.

05 / A 90-DAY PATH

Sequence the decisions, not just the tasks.

Completeness defines what can move. Ownership defines who moves it. Only then does a field mapping have a stable destination. This ordering is a recommendation for the fictional workflow, not a universal implementation formula.

01

Complete

Weeks 1-4

O01 / Start here

A complete order, first time.

02

Own

Weeks 5-8

O02 / Pilot next

An owned handoff to invoicing.

03

Connect

Weeks 9-12

O03 / Prove feasibility first

Less repetition, with control.

RULES FOR THE NEXT DECISION

- Treat the three effects separately. The same order can appear in more than one opportunity, and task-capacity estimates can overlap.
- Keep elapsed time, labor time and cash separate. None of the example calculations establishes a realized financial return.
- A failed pilot is useful evidence. Keep the baseline, record the finding and revise or stop the change before expanding it.

THE DAY-90 REVIEW

Days 85-90: close the review. Confirm what changed, what the evidence supports, who owns the process and what remains unresolved. Record any financial benefit only if finance has validated it. No benefit is assumed in advance.

05 / WHO DOES WHAT, AND WHEN

A plan with decision gates.

WEEKS 1-4 / P01

Establish the facts. Stabilize intake.

Agree the boundary, replace the synthetic baseline with actual authorized evidence and pilot the completeness checklist.

OWNER

Process owner + customer service lead

LEAVE BEHIND

An agreed baseline register, a working intake checklist and a recorded pilot decision.

- Confirm definitions, exclusions, source access and the order identifier used across systems.
- Review the baseline with the people doing the work; include open items separately so backlog is visible.
- Pilot O01, capture overrides and inspect any new intake burden.

Example gate: the O01 pilot meets the clarification target, all overrides have an owner, and the process owner accepts the impact on entry effort.

WEEKS 5-8 / P02

Make the handoff dependable.

Pilot the invoice-ready queue and check integration feasibility without altering credit or invoice approval.

OWNER

Accounts receivable lead + warehouse lead

LEAVE BEHIND

An owned exception queue, a measurement review and a go/no-go feasibility note.

- Agree the dispatch-to-invoice-ready event, queue status and exception owner.
- Compare the O02 pilot to a comparable baseline cohort; inspect corrections and unresolved items.
- Have the ERP owner test a read-only field mapping and record interface constraints for O03.

Example gate: eligible S05 items meet the queue-time target without more invoice corrections; the mapping has an agreed validation and fallback design.

05 / THE FINAL PHASE

Prove it before it scales.

WEEKS 9-12 / P03

Prove the mapping. Decide what scales.

If the earlier gates pass, run a limited draft-invoice pilot. Reconcile the results before expanding use.

OWNER

ERP owner + finance lead + process owner

LEAVE BEHIND

A pilot outcome record, an updated procedure and an explicit scale, revise or stop decision.

- Dry-run O03 and resolve mapping differences before any live draft creation.
- Validate the pilot against the agreed approval, duplicate and reconciliation controls.
- Document the operating procedure, maintenance owner and remaining exceptions.

Example gate: all pilot drafts reconcile, repeated-entry effort meets the target, and the finance lead accepts the controls. Otherwise pause or return to the manual fallback.

THE MEASUREMENT PROTOCOL

- Freeze the event definitions before the pilot. Keep order identifiers so a reviewer can reconcile records across sources.
- State the denominator, observation window and exclusions on every comparison. Inspect the distribution and exceptions, not just the mean.
- Keep a decision log: what changed, when, who approved it and what else changed at the same time.
- Treat before-and-after movement as an observed association. Use a more controlled comparison if a causal claim matters to the investment decision.

06 / MEASUREMENT REGISTER

Make the result reviewable.

The baseline is a starting point, not a promise. Use the same definitions and comparable cohorts before and after each change. Record changes in demand, staffing, order mix and exceptions alongside the numbers.

Clarification rate

Customer service lead

Example: 25% of 100 orders

Example: no more than 10% of 50 pilot orders

E02; intake checklist and clarification log

End of week 4; then weekly during the pilot

Record intake effort and every authorized override.

S05 elapsed time, eligible subgroup

Accounts receivable lead

Example: 6 business hours; 35 records

Example: 2 business hours in a comparable subgroup

E04; dispatch and invoice-ready timestamps

End of week 8; daily queue checks

Track invoice corrections and unresolved queue items.

Order and invoice entry time

ERP owner + finance lead

Example: 12 minutes; 5 walkthroughs

Example: 9 minutes in total; 50 eligible pilot orders

E03; task timing and draft reconciliation

End of week 12; review each pilot batch

No unexplained field mismatch or duplicate draft; approval remains mandatory. Check that the unchanged S02 entry time and review effort assumptions hold.

End-to-end cycle

Process owner

Example: mean 16.4 business hours; 100 orders

Diagnostic measure; do not set an aggregate benefit target yet

E01; the same start and finish events

Each phase gate and the day-90 review

Report cohort mix, open items and exclusions separately.

Measurement protocol / page 16

Limitations / page 19

06 / A PRACTICAL STARTING POINT

A starter asset your team could use tomorrow.

Order completeness and invoice-ready checklist

Example working template. Review with the process owner before use.

FIELDS TO CARRY WITH THE ORDER

- ☐ Order ID and original purchase-order reference
- ☐ Customer account, ship-to and named contact
- ☐ Item, quantity and approved price reference
- ☐ Completeness status: ready / waiting / approved exception
- ☐ Dispatch reference and confirmation timestamp
- ☐ Invoice-ready status, exception reason, owner and next review
- ☐ Credit approval reference, invoice reviewer and issue timestamp

CHECKS AT THE HANDOFF

AT INTAKE

Check the required fields. Attach the original request. Assign any missing detail to a person before the order moves.

AT DISPATCH

Match the shipment reference to the approved order. Mark partial or unmatched items as exceptions; do not guess missing values.

BEFORE INVOICE ISSUANCE

Resolve or explicitly authorize the exception. Reconcile the draft to the order and dispatch. Keep existing credit and invoice approvals.

AT DAILY REVIEW

Inspect waiting items by owner and next review time. Record the action taken, not just a changed status.

HOLD, ASSIGN, RECONCILE

Stop rule: if an order, dispatch or draft invoice cannot be reconciled, hold the affected item, assign a reviewer and use the approved manual route. Never silently overwrite a mismatch.

Decision record: order ID | exception | evidence link | action | owner | approval | timestamp | next review. The downloadable template includes blank rows and field definitions.

Download the blank checklist (CSV)

Read the field definitions

07 / WHAT STILL NEEDS TO BE PROVED

Keep the uncertainty visible.

Does the cohort represent the work?

Completed, stocked orders exclude backlog, canceled items and complex exceptions.

Ask the process owner to compare the scoped cohort with the wider order mix before a pilot.

Process owner

Is ownership the cause of delay?

Batching, staffing or shipment complexity could explain the longer interval at S05.

Review those factors by order and keep them in the comparison register.

Accounts receivable lead

Can the systems reuse the fields safely?

An available screen is not proof of a supported API, import or reliable identifier.

Confirm interface behavior, access, duplicates, reconciliation and rollback before changing the live workflow.

ERP owner

Will released time become useful capacity?

Task time is not the same as a payroll saving or a measurable service improvement.

Name the work the team would do with released capacity and have finance validate any financial claim.

Process owner + finance lead

AN AUTHORED SAMPLE

An authored example, not a client engagement. All company details, records, observations and operational figures are fictional examples. Proposed effects are hypotheses to test, not achieved results. No analyst sign-off is claimed for this sample.

07 / THE PAID ASSESSMENT METHOD

One workflow. A reviewed next move.

01 Define one workflow

Agree a start, a finish, the business boundary and the decision the assessment should support. Resolve scope questions before gathering evidence.

02 Complete the guided assessment

Walk through normal work and exceptions, supply the authorized source material and answer blocking questions. The delivery clock starts when the evidence checklist is complete.

03 Trace evidence into recommendations

Connect each finding to a source and a workflow step. Separate observations, assumptions and proposed effects. Make missing evidence visible.

04 Senior process analyst review

A senior process analyst reviews evidence sufficiency, assumptions, priorities and measurement design before the paid Trail Map is delivered.

05 Deliver the decision and the plan

Receive the reviewed Trail Map and a 90-day plan in five business days after the evidence checklist is complete. The exact workflow and scope are agreed during intake.

ABOUT THIS SAMPLE

No analyst sign-off is claimed for this sample. A paid assessment replaces every example with the evidence your team authorizes.

08 / SOURCE APPENDIX

Every finding has a source.

Authored synthetic material. These sources are not independent corroboration.

E01 Order trail register

Example: 100 completed orders, with stage business-clock durations, clarification status and touch counts. The common order ID connects the supporting records.

Workflow stages; mean cycle; touch count; the NW-028 trace.

Authored synthetic durations, not system event logs. No distributional or company-wide inference.

E01-example-order-trail.csv

E02 Order completeness audit

Example: the same 100 orders; 25 have a missing required field and a clarification loop. Each affected record names the field.

O01 and the clarification baseline.

Constructed field flags, not independent evidence or a causal test.

E02-example-completeness-audit.csv

E03 Entry walkthrough notes

Example: five authored walkthroughs showing order and invoice entry time and repeated fields. Mean combined entry time is twelve minutes.

O03 and the manual-entry baseline.

A small illustrative set; it cannot validate an investment case or an automation interface.

E03-example-walkthroughs.csv

E04 Invoice-ready queue

Example: the same 100 orders; 35 lack a named match owner. The S05 intervals match the order trail register.

O02, the subgroup comparison and the NW-028 trace.

Missing ownership and delay are associated by construction. Causality is not established.

E04-example-invoice-queue.csv

E05 Current procedure and role notes

An authored description of the six-step workflow, existing approval boundaries and the incomplete ownership rule.

Role and system mapping, scope, dependencies and proposed checklist.

Fictional procedure, not an interview transcript or an actual operating policy.

E05-example-procedure.md

Full evidence pack / ZIP

Interactive report and source links

08 / COMMISSION YOUR OWN TRAIL MAP

Your workflow. Your evidence. Your next move.

$1,500

USD. Fixed price for one workflow.

Five business days after your evidence checklist is complete.

Reviewed by a senior process analyst.

A 90-day plan.



David Bell

ProcessScout review lead

25 years in operations and finance, including Shell and Deutsche Bank; founder and CEO of JustPayroll through its 2024 acquisition.

David Bell leads the review approach. The analyst assigned to your assessment owns its recommendations and sign-off.

Three opportunities or your fee back.

If ProcessScout cannot identify at least three evidence-backed opportunities from a good-faith intake, the assessment fee is refunded under the assessment terms. This is a deliverable guarantee, not a promise of realized savings.

Assessment terms

IMPLEMENTATION CREDIT

The full $1,500 fee can be credited toward a ProcessScout-delivered implementation of $7,500 or more signed within 30 days of Trail Map delivery. Unused credit expires; it cannot be transferred to fees charged by your own implementation partner.

Start an assessment

CANCELLATION AND SCOPE PROTECTION

Cancel before analyst review starts for a full refund. If the report materially misses the agreed brief, tell us within 14 days of full access and choose an in-scope correction or a refund after review.

Full protection policy

SCOPE OF YOUR ASSESSMENT

This sample illustrates the form and depth of the work. The actual findings depend on your evidence and agreed scope. Production implementation is a separate engagement. CSV-only financial evidence requires preapproval and a separately agreed delivery date.

This sample shows the format. In a paid assessment, a named analyst reviews and signs off every finding before delivery.