AN EXAMPLE TRAIL MAP

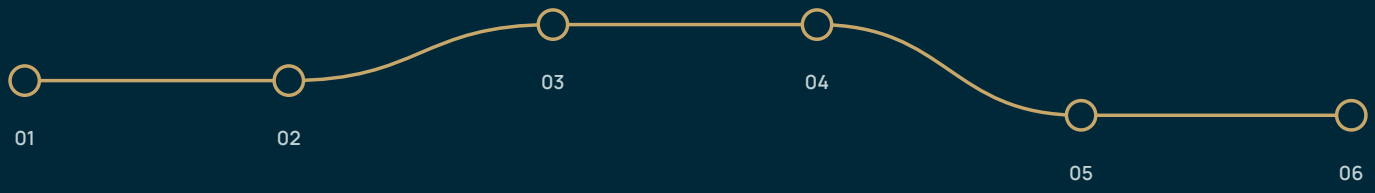
Map the business you bought.

A Trail Map (the reviewed report format) for quote acceptance through order release in one acquired business.

Alder Pump & Valve

A fictional acquired US distributor, reviewed as one entity and one stocked-parts unit.

THE SIX-STEP TRAIL



Stocked-parts quote accepted TO Approved order released to fulfillment

This fictional sample shows the format and reasoning. Every record and operational figure is authored; pilot targets are proposals to test. In a paid assessment, a named analyst reviews and signs off every finding before delivery.

Explore the interactive report

01 / DECISION AND BASELINE

Start with a decision.

Alder's accepted quotes still depend on local interpretation before an order can be released. Revised terms and legacy account codes need visible decisions. Preserve that knowledge first, then decide what can be standardized. This example maps the acquired entity; it does not compare two companies.

RECOMMENDED FIRST MOVE

Authorize a one-unit pilot of quote revision control and explicit code interpretation. Keep existing credit and order-release authority until the new handoff has been tested.

ILLUSTRATIVE BASELINE / AUTHORED DATA, NOT MEASURED CUSTOMER RESULTS

11.2 business hours / order

Quote-to-release time

Elapsed time from quote acceptance to authorized order release.

672 business hours / 60 released orders = 11.2 hours.

Released orders exclude open work; elapsed time includes waiting, not just labor.

Source E01

14 of 60 released orders

Revised after quote approval

Orders whose accepted terms change before release.

14 revision flags among 60 unique order IDs.

Authored example; compare the same cohort definition in a real pilot.

Source E02

9 of 60 released orders

Undocumented code interpretation

Orders requiring a person to interpret a legacy account code without a retained rule.

9 interpretation flags among the same 60 orders.

Authored example; compare the same cohort definition in a real pilot.

Source E02

5 of 14 revised orders

Release resolver missing

Revised orders without a named person to resolve release readiness.

5 missing resolvers among 14 revised orders.

The denominator is revised orders; the same order may also need code interpretation.

Source E04

02 / FOLLOW THE HANDOFFS

The work, before and after.

In scope: One acquired legal entity, one sales unit and stocked-parts orders. Accepted quote, revision, account-code interpretation and release decision. Local knowledge and ownership at the pre-fulfillment handoff.

CURRENT TRAIL

Accept quote

Sales coordinator / Quote file

Save acceptance; later changes can arrive outside the accepted version.

Interpret account code

Sales administrator / Legacy code sheet

Ask an experienced colleague which account treatment the code implies.

Enter the order

Order desk / Local ERP

Copy approved commercial fields and the interpreted code into an order.

Resolve revisions

Account manager / Email

Discuss changed terms; the next release action has no consistent owner.

Approve release

Credit controller / ERP hold queue

Apply existing credit and commercial approval rules.

Hand to fulfillment

Order desk / Release record

Release the order with the supporting quote and revision trail.

PROPOSED TRAIL / PILOT DESIGN

Pin the accepted version

Sales coordinator / Quote register

Record accepted quote ID, version and customer acceptance.

Record code meaning

Data owner / Mapping register

Approve legacy meaning and an explicit unknown-code route.

Reconcile order fields

Order desk / ERP draft

Check account, item, quantity and price against approved sources.

Own each revision

Account manager / Revision queue

Name resolver, approval required and next review time.

Retain release control

Credit controller / ERP hold queue

Require the existing approvals and retained decision before release.

Release a supported order

Order desk / Versioned release pack

Link the accepted quote, approved change and code decision.

Outside scope: Parent-company workflow comparison, ERP consolidation and organizational integration. Fulfillment, collections, synergy valuation and acquisition diligence.

03 / INSPECT THE AUTHORED EVIDENCE

Evidence before interpretation.

Four authored working weeks; 60 released orders. Fourteen have a post-approval revision, nine need legacy-code interpretation and five of the fourteen revised orders lack a named release resolver. Groups overlap. Timing uses an authored eight-hour weekday clock.

E01 Acquired-unit order trail

Synthetic event register / 60 released stocked-parts orders over four weeks.

Accepted-quote to release intervals total 672 business hours. Order IDs join quote, entry and release; the mean is 11.2 hours.

Interpretation: The interval includes waiting. Open orders need a separate age view.

E02 Quote and legacy-code workbook

Authored field audit / The same 60 order IDs and accepted quote versions.

14 orders change after quote approval. Nine require undocumented account-code interpretation. Their overlapping flags stay attached to the order.

Interpretation: A legacy code may be valid local knowledge. Its meaning must be established before replacement.

E03 Sales-to-credit handover walkthrough

Authored walkthrough / ALD-006 / quote Q-841 revision 2, before order release.

The customer changes quantity. A credit lead explains the legacy account condition; sales updates the order, but the revised approval is not linked to the release record.

Interpretation: This illustrates a knowledge and evidence dependency; interviews must test how often it arises.

E04 Revision release queue

Synthetic ownership review / The fourteen orders revised after quote approval.

Five revised orders have no release resolver. Eight of the fourteen revised orders also lack a retained approval link for the changed terms. The categories overlap.

Interpretation: Resolver and approver are different roles. A blank field alone does not explain delay.

E05 Local release authority

Authored procedure excerpt / Credit release, commercial changes and fulfillment handoff.

Credit and commercial approvals remain separate. A quote change needs authorized acceptance before the order can leave the hold queue.

Interpretation: A one-entity map cannot justify adopting or removing controls across the group.

04 / OPPORTUNITY 01 / PRESERVE THE DECISION

Keep the accepted quote intact.

PROPOSED OWNER

Sales operations lead

EFFORT

Low; version and change checklist

WHAT THE EXAMPLE SHOWS

E02 E04 E05

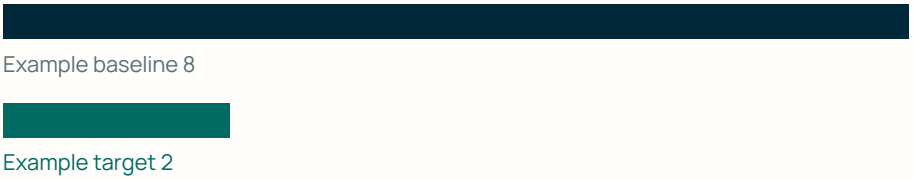
14 of 60 released orders change after quote approval. Eight of those fourteen lack a linked approval of the revised terms, so the release trail is incomplete.

WHAT CHANGES

Pin the accepted quote version. Record changed fields, customer acceptance and the commercial approver before updating the order. Preserve the previous version so a new owner can understand the decision.

ILLUSTRATIVE PILOT TARGET / UNMEASURED

approval gaps / 14 revisions



Pilot threshold: at most 2 of 14 comparable revised orders missing their approval link, versus 8 of 14 in the example. Retain every legitimate change; the target concerns its evidence, not the number of customer revisions.

CONTROL THAT STAYS

A revision still requires the existing commercial and credit decisions. Retain the source acceptance; an intake rule cannot approve changed prices.

MEASUREMENT AND DECISION GATE

Review the next 14 comparable revised orders. Retain the gate only if authorized changes remain traceable and fulfillment does not use superseded terms.

Competing explanation: Some revisions are valid customer changes. Diagnose which cases reflect missing control before treating the count as preventable.

04 / OPPORTUNITY 02 / DEFINE THE MEANING

Make local knowledge transferable.

PROPOSED OWNER

Acquired-unit data owner

EFFORT

Medium; mapping and reconciliation

WHAT THE EXAMPLE SHOWS

E02 E03

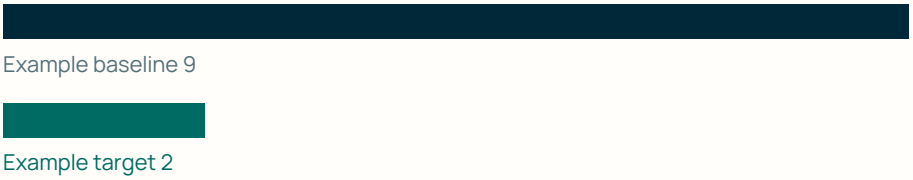
Nine orders need an undocumented account-code interpretation. The answer exists in a person's experience, but the next colleague cannot inspect its basis.

WHAT CHANGES

Build a small legacy-code register with meaning, source, effective date and approving owner. Route unknown or conflicting meanings to that owner. Test the interpretation against known orders before suggesting any shared group convention.

ILLUSTRATIVE PILOT TARGET / UNMEASURED

undocumented codes / 60 orders



Pilot threshold: at most 2 undocumented interpretations per 60 comparable orders, versus 9 in the example. Count unresolved meanings explicitly and test mapping accuracy alongside completeness.

CONTROL THAT STAYS

Documenting a code does not authorize changing a customer account, credit status or reporting treatment. Keep proposed mappings reversible.

MEASUREMENT AND DECISION GATE

Reconcile each pilot interpretation to approved local evidence. Stop on a meaning conflict or incorrect downstream treatment; keep the original code available.

Competing explanation: An unusual account may need legitimate judgment. A mapping should preserve exceptions instead of pretending every code is interchangeable.

04 / OPPORTUNITY 03 / OWN THE HANDOFF

Name the next release decision.

PROPOSED OWNER

Order desk lead

EFFORT

Low; resolver and review cadence

WHAT THE EXAMPLE SHOWS

E01 E04 E05

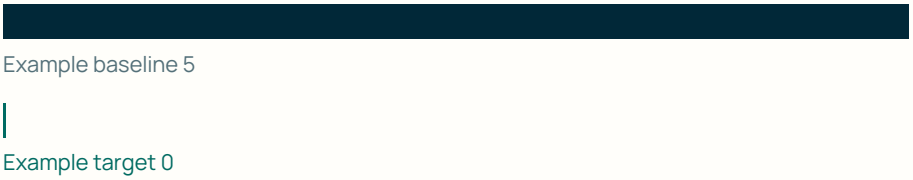
Five of fourteen revised orders lack a release resolver. The credit approver is known, but nobody owns the evidence needed for that decision.

WHAT CHANGES

Give each revised order a resolver, missing-evidence reason and next review time. Keep the credit approver distinct. Use one release-ready pack that links the current quote, code decision and required approvals.

ILLUSTRATIVE PILOT TARGET / UNMEASURED

unassigned / 14 revised orders



Pilot threshold: 0 unassigned revision cases in a comparable set of 14, versus 5 in the example. Track elapsed quote-to-release time against 11.2 hours without treating it as labor or synergy savings.

CONTROL THAT STAYS

The resolver prepares the decision; only the authorized approver releases the hold. Urgent exceptions need a retained reason and approval.

MEASUREMENT AND DECISION GATE

Every revised order has a resolver and a visible next decision. Compare queue age and release errors before expanding the design.

Competing explanation: Commercial negotiation or credit risk may drive waiting even with clear ownership. Preserve those reasons in the queue.

05 / TURN THE REPORT INTO DECISIONS

The next 90 days.

An illustrative sequence. Replace the synthetic baseline with authorized evidence, then scale only what passes its gate. A failed pilot is a reason to revise or stop.

DAYS 1-30

Preserve the local decision trail.

Sales lead + acquired-unit owner

Confirm the one-entity boundary and replace the authored records. Pilot accepted-version and revision controls.

Decision gate: A released order can be traced to authorized customer terms.

DAYS 31-60

Test the legacy-code meanings.

Data owner + order desk

Document recurring interpretations and the unknown-code route. Reconcile mappings against known orders before reuse.

Decision gate: No unresolved mapping is treated as an approved operating rule.

DAYS 61-90

Decide what can be standardized.

Unit manager + integration sponsor

Measure the owned release queue and inspect approval quality. Select local changes; scope any cross-entity comparison separately.

Decision gate: Retain, revise or stop each pilot on evidence from the acquired unit.

ASSUMPTIONS TO KEEP VISIBLE

- All 60 released orders and their timings are invented.
- Revision, code and ownership groups overlap.
- No integration savings or parent-company comparison is claimed.

OPEN QUESTIONS AND OWNERS

- Sales lead: distinguish legitimate changes from avoidable rework.
- Data owner: approve the meaning and authority of legacy codes.
- Sponsor: define any later cross-entity comparison separately.

06 / YOUR NEXT STEP

Make this your workflow.

Edge is ProcessScout's guided assessment service for one recurring workflow.

$1,500 USD

PAID UPFRONT

One legal entity, one business unit and one workflow.

WHAT YOU RECEIVE

A Trail Map (the reviewed report you receive), three prioritized opportunities, a baseline and a sequenced 90-day plan.

One supported starter asset: an SOP, control checklist, requirements specification or automation blueprint. Production implementation is a separate engagement.

WHEN YOU RECEIVE IT

Five business days after your evidence checklist is complete.

The clock starts when sources, recordings, documents, interview and blocking questions are complete. Payment alone does not start it.



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.

Read assessment terms

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.

Read the full protection policy

Book a 15-minute fit call

Discuss fit, scope and your decision. The call is not the assessment itself.

Open this interactive sample