AN EXAMPLE TRAIL MAP

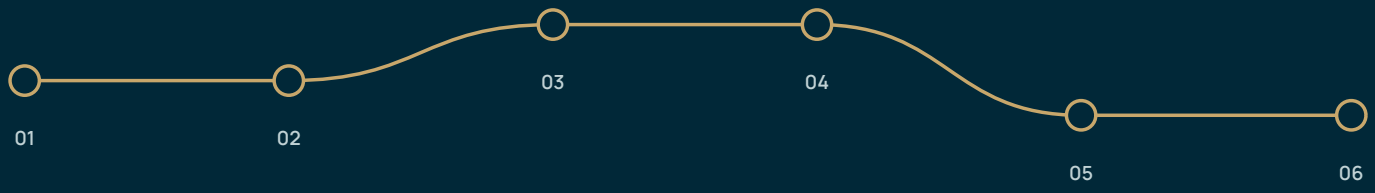
Give the board a usable baseline.

A Trail Map (the reviewed report format) from completed service to invoice-ready evidence in one portfolio company.

Granite Commercial Services

A fictional US portfolio company, assessed within one contract-billing unit.

THE SIX-STEP TRAIL



Contract service recorded complete TO Supported invoice-ready pack accepted by billing

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.

Granite's completed work is not always ready to bill. Customer acceptance, scope-change authority and escalation are spread across operational records. Give the operating partner a bounded decision: improve the evidence handoff in this unit, measure it consistently and preserve the difference between readiness and realized cash.

RECOMMENDED FIRST MOVE

Authorize a one-unit pilot of acceptance evidence and scope-change control, with a named escalation owner. Review invoice-readiness time and exceptions before making a broader value-creation claim.

ILLUSTRATIVE BASELINE / AUTHORED DATA, NOT MEASURED CUSTOMER RESULTS

9 business hours / pack

Completion-to-invoice-ready time

Elapsed time from recorded service completion to acceptance by the billing reviewer.

720 business hours / 80 billing packs = 9 hours.

Includes waiting; invoice issuance and cash receipt sit outside the measured interval.

Source E01

16 of 80 billing packs

Acceptance evidence missing

Packs lacking required customer acceptance at first billing review.

16 missing acceptance flags among 80 pack IDs.

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

Source E02

10 of 80 billing packs

Scope change unapproved

Packs with a scope change lacking approval at first billing review.

10 unapproved change flags among 80 packs.

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

Source E02

6 of 16 acceptance gaps

Escalation owner missing

Acceptance exceptions without a named escalation owner at first billing review.

6 missing owners among 16 acceptance exceptions.

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

Source E04

02 / FOLLOW THE HANDOFFS

The work, before and after.

In scope: One legal entity, one contract-billing unit and recurring service work. Completion, customer acceptance, scope-change authority and billing readiness. An operating baseline and accountable pilot for the company owner.

CURRENT TRAIL

Record service complete
Service manager / Job system

Mark completion and retain the delivered work reference.

Find customer acceptance
Account coordinator / Email + portal

Locate acceptance evidence needed by the contract.

Check scope changes
Contract manager / Change log

Reconstruct whether changed work has commercial approval.

Assemble billing pack
Billing analyst / Shared workbook

Combine work, acceptance and contract references.

Resolve missing evidence
Account manager / Exception inbox

Chase customer or internal decisions; some gaps have no escalation owner.

Accept invoice readiness
Billing lead / Finance queue

Review the pack before any invoice is prepared.

PROPOSED TRAIL / PILOT DESIGN

Record supported completion
Service manager / Completion checklist

Link the work record and required completion evidence.

Capture contract acceptance
Account coordinator / Acceptance register

Use the evidence required by the specific contract.

Reconcile approved changes
Contract manager / Change control

Match changed scope to retained customer and internal authority.

Build one billing pack
Billing analyst / Linked pack

Carry contract, work, acceptance and change references together.

Own each escalation
Account manager / Exception queue

Name resolver, escalation point and next customer action.

Approve readiness separately
Billing lead / Review queue

Record ready or returned with the exact supported version.

Outside scope: Portfolio benchmarking, investment valuation and financial diligence. Invoice issuance, collections, revenue recognition and EBITDA claims.

03 / INSPECT THE AUTHORED EVIDENCE

Evidence before interpretation.

Four authored working weeks; 80 packs that reached billing readiness after service completion. At first billing review, 16 lack acceptance, 10 have an unapproved scope change and 6 of the 16 acceptance gaps lack an escalation owner. Historical gap flags overlap. Timing uses an authored eight-hour weekday clock.

E01 Completed-service billing trail

Synthetic event register / 80 billing packs for one entity and unit.

Completion-to-invoice-ready intervals total 720 business hours, averaging 9 hours. The trail ends at billing acceptance, before invoice issue or collection.

Interpretation: The baseline is local to the defined unit. It cannot be extrapolated across a portfolio.

E02 Acceptance and change workbook

Authored pack audit / First billing review of the same 80 packs.

Sixteen packs lack required acceptance. Ten include an unapproved scope change. Pack-level flags overlap and are counted once per category.

Interpretation: Contract requirements differ. Distinguish missing evidence from a genuinely disputed service.

E03 Service-to-billing walkthrough

Authored walkthrough / One completed service is prepared for invoice-readiness review.

GRA-011 reaches finance as completed monthly service under contract C-118. Acceptance is missing and an extra visit lacks linked customer authority; the analyst searches separate files before review.

Interpretation: The steps suggest where to investigate effort; the elapsed baseline is not a labor estimate.

E04 Acceptance escalation queue

Synthetic ownership review / The sixteen missing-acceptance packs.

Six acceptance exceptions have no escalation owner. A general account owner is recorded, but the next evidence or customer decision is not assigned.

Interpretation: Customer delay may persist after assignment. Record reasons and age alongside ownership.

E05 Contract billing authority

Authored procedure excerpt / Acceptance, scope-change approval and invoice-readiness review.

The billing reviewer requires the evidence specified by the contract. Unapproved work cannot be made billable by changing a queue status.

Interpretation: Commercial authority and revenue recognition remain decisions for the company's qualified owners.

04 / OPPORTUNITY 01 / ESTABLISH THE EVIDENCE

Define acceptance before billing.

PROPOSED OWNER

Contract operations lead

EFFORT

Low; contract-specific checklist

WHAT THE EXAMPLE SHOWS

E01 E02 E05

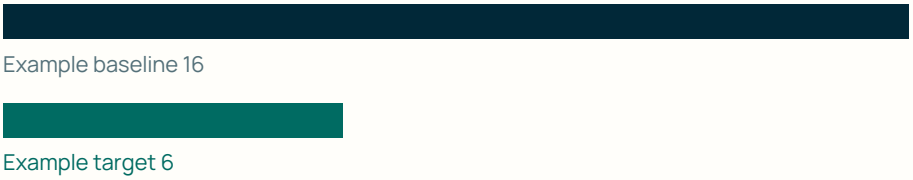
Sixteen of eighty packs lack the acceptance evidence required at first billing review. Completion and customer acceptance are being treated as if they were the same decision.

WHAT CHANGES

Define required acceptance evidence by in-scope contract type and attach it to the completed service. Keep pending acceptance visible and name the account contact who can obtain it. Return unsupported packs with a specific missing item.

ILLUSTRATIVE PILOT TARGET / UNMEASURED

acceptance gaps / 80 packs



Pilot threshold: at most 6 acceptance gaps per 80 comparable packs, versus 16 in the example. Compare the 9-hour readiness interval separately and retain the count of unresolved packs.

CONTROL THAT STAYS

An internal completion status does not substitute for contractually required acceptance. Keep disputes and authorized exceptions visible.

MEASUREMENT AND DECISION GATE

Inspect each pilot pack against its contract evidence requirement. Retain the checklist only if readiness decisions remain supported and disputed work is not hidden.

Competing explanation: Some customers provide acceptance only on a scheduled cycle. Separate normal contract timing from missing capture.

04 / OPPORTUNITY 02 / CONTROL SCOPE CHANGES

Keep changed work authorized.

PROPOSED OWNER

Commercial contract manager

EFFORT

Medium; change register and review

WHAT THE EXAMPLE SHOWS

E02 E03 E05

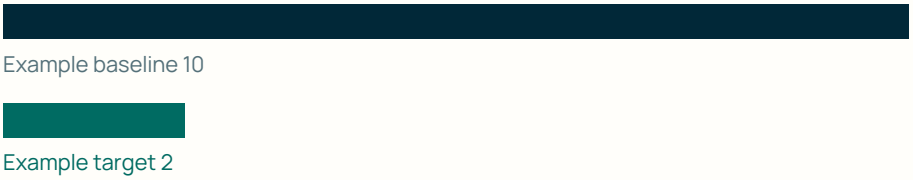
Ten packs include a scope change without the required approval. The work record and the commercial decision are not consistently connected.

WHAT CHANGES

Link each changed service line to its scope, customer approval and internal authority. Show pending changes separately from approved billable work. Preserve the original contract and the exact version of each accepted variation.

ILLUSTRATIVE PILOT TARGET / UNMEASURED

unapproved changes / 80 packs



Pilot threshold: at most 2 unapproved scope-change packs per 80 comparable packs, versus 10 in the example. This is a control-completeness test, not a revenue-uplift calculation.

CONTROL THAT STAYS

Do not infer customer consent from delivery or internal approval. Commercial terms, recognition and invoice authority remain unchanged.

MEASUREMENT AND DECISION GATE

Every pilot change line has valid authority or an explicit hold. Reconcile the pack to approved scope before billing readiness is accepted.

Competing explanation: A change may have valid approval stored elsewhere. Confirm the authoritative record before imposing another approval.

04 / OPPORTUNITY 03 / MAKE THE NEXT ACTION VISIBLE

Give the operating owner a queue.

PROPOSED OWNER

Business-unit general manager

EFFORT

Low; escalation and weekly review

WHAT THE EXAMPLE SHOWS

E01 E04 E05

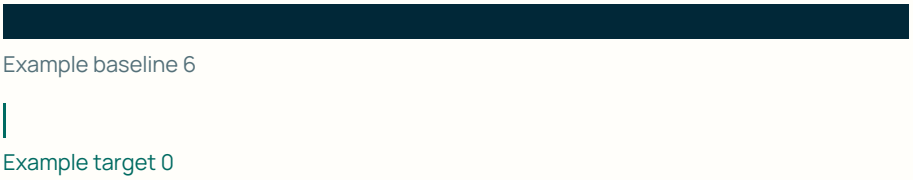
Six of sixteen acceptance gaps lack an escalation owner. A portfolio report can count the issue without identifying who can resolve the underlying handoff.

WHAT CHANGES

Name the resolver, next action, customer escalation and review date for each gap. Give the unit owner a weekly view of age, reason and outcome. Share the defined local baseline with the operating partner instead of presenting a portfolio-wide saving.

ILLUSTRATIVE PILOT TARGET / UNMEASURED

unowned / 16 acceptance gaps



Pilot threshold: 0 missing escalation owners among 16 comparable acceptance gaps, versus 6 in the example. Judge readiness time and unresolved age together; do not convert elapsed hours into EBITDA or cash.

CONTROL THAT STAYS

The operating partner does not replace contractual or financial approval. Keep customer commitments with authorized company owners.

MEASUREMENT AND DECISION GATE

Every exception has an executable next action and a real owner. Continue only if queue aging and decision quality improve under comparable conditions.

Competing explanation: An owner may lack customer access or authority. Rehearse one escalation and verify that the assigned role can act.

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

Fix the local baseline.

Unit manager + billing lead

Define the contract cohort and replace the authored timing. Pilot required acceptance evidence on comparable packs.

Decision gate: The baseline distinguishes completion, readiness, invoicing and cash.

DAYS 31-60

Reconcile scope and authority.

Contract manager + finance

Attach approved changes and isolate disputed scope. Review returned packs and commercial exceptions.

Decision gate: Readiness decisions follow actual contract and approval evidence.

DAYS 61-90

Review the investment decision.

Unit owner + operating partner

Review queue age, controls and pilot results. Decide on local rollout; separately scope any portfolio comparison.

Decision gate: Any future benefit claim has a defined measure and accountable owner.

ASSUMPTIONS TO KEEP VISIBLE

- All 80 packs and their timings are authored.
- Acceptance and scope-change gaps may affect the same pack.
- Readiness time is not collections, EBITDA or investment return.

OPEN QUESTIONS AND OWNERS

- Contract lead: identify acceptance requirements by contract.
- Unit manager: validate escalation authority and real queue age.
- Finance lead: define any later cash or economic measurement 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