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An enquiry-to-job roadmap

Illustrative sample • Fictional business and workflow. This shows a decision-making format, not a client result, a quotation or a complete implementation specification.

01	1 / The decision	A small service business receives job requests in a shared inbox. Office staff copy the details into a job system and chase missing references. The question is whether to improve the process, configure existing software or commission an integration.
02	Current-state map	Customer email → office administrator checks the request → searches for an existing customer/job → copies approved details → assigns an owner → drafts an acknowledgement. Missing references, duplicate enquiries and unclear addresses go back to a person.
03	Boundaries and accountable people	Process owner: office manager. Daily reviewer: administrator. Decision sponsor: owner/director. Scope: enquiry intake and job-record preparation. Excluded: automated pricing, contractual commitments, payment collection and dispatch decisions.
04	Evidence needed before recommending a build	Collect a representative sample of enquiries with appropriate controls. Record handling time, volumes, duplicates, missing fields, rework and response delays. Check the job system's native intake options, licence, API access and export facilities. Do not assume an AI model is required.
05	Illustrative exception row	Incoming order lacks a job reference → office review queue → staff validate completeness before any system write → measure handling time and exception rate → decide whether native rules are sufficient.
06	Decision today	Baseline and supplier access are not yet known. Do not authorise a custom build. First test whether clearer ownership and existing-system configuration address the problem.

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Compare options before choosing technology

2 / Options register • Estimates are deliberately left as evidence fields, not invented prices or promised benefits.

01	A. Improve the manual process	Define required fields, one owner and a missing-information template. Lowest integration dependency. Still requires staff handling. Evidence: time and error baseline before/after a representative trial. Cost inputs: staff time for setup, training and continuing review.
02	B. Configure the existing system	Check native email intake, forms and duplicate controls with the software supplier. Prefer configuration if it meets the requirement. Dependencies: plan entitlement, permissions, export and reliable exception handling. Cost inputs: licence changes, configuration, testing and support.
03	C. Scope a separate integration	Consider only if A/B leave a material, measurable gap. An integration could prepare a draft job record and route uncertainty to a person. Dependencies: supported API, authentication, failure recovery and data-processing terms. Cost inputs: engineering, validation, hosting, monitoring, maintenance and user review.
04	D. Defer or do not build	Appropriate if volumes are low, the process is changing, supplier access is unavailable or the plausible benefit does not justify ownership cost. Revisit when the baseline or business constraint changes.
05	Commercial assessment	Net capacity released = handling time avoided minus review and exception time. Value capacity using an agreed rate, but do not count it as cash savings unless actual expenditure falls. Compare downside, expected and upside assumptions against full ownership cost. A supplier quote is not an achieved result.

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A controlled implementation decision

3 / Prioritised plan • The stages below are illustrative. Dates, fees and acceptance thresholds would be agreed for the actual engagement.

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| 01 | First: baseline and process ownership | Office manager gathers a representative sample and agrees definitions of complete, duplicate and exception. Sponsor approves the measurement period and success thresholds. Deliverable: baseline, current-state map and unresolved questions. |
| 02 | Next: test native configuration | Software owner confirms supported features and permissions. Trial controlled examples, including missing fields and repeat submissions. Compare review effort and rework with the baseline. Gate: accept native configuration only if it meets the agreed criteria. |
| 03 | Only if justified: commission a scoped build | Delivery partner specifies fields, permissions, supplier dependencies, costs and failure recovery. Test with non-production examples first. A person approves any move to production and retains authority over uncertain records. No automated commitments to customers. |
| 04 | Acceptance and handover | Test valid, missing, duplicate and failed requests. Confirm no duplicate job creation, visible exceptions, permissions, logs and a usable manual fallback. Train the process owner; document support ownership and how to disable the workflow. Compare measured results after adoption with the original baseline. |
| 05 | What a delivery partner still needs | Detailed field mappings, API contract, credentials through secure channels, retention rules, representative test cases, acceptance thresholds, rollout plan and signed commercial terms. This sample is not sufficient to authorise or build a production system. |

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