

COMMERCIAL WORKFLOW FIELD KIT

Find the work worth fixing first.

A practical six-part workbook for specialist firms that want to improve one recurring commercial workflow without beginning with a broad transformation programme.

01 Choose one workflow Keep the scope small enough to control and important enough to measure.

02 Make ownership visible Name the trigger, owner, decision gate, exceptions and recorded outcome.

03 Prove what four weeks can change Agree the baseline first, then capture corrections and evidence while the work runs.

Use this with one real workflow.

Bring the people who own, approve and depend on the work. Honest friction is more useful than a polished process map.

PART 1 / CHOOSE THE WORK

The one-workflow brief

Name one recurring piece of commercial work. Avoid describing a department, platform or transformation programme.

Workflow

What work repeats and has a visible commercial consequence when it stalls?

Trigger

What event, signal or request starts the work?

Outcome

What recorded result proves that this instance of the work is complete?

Why now?

What is the cost of leaving this workflow as it is for another quarter?

PART 2 / SCORE THE FRICTION

Is this ready for a controlled pilot?

Score each condition 0 (not true), 1 (partly true) or 2 (clearly true). A lower score does not mean automate harder; it identifies what must be clarified first.

Condition	Question	0	1	2
Recurrence	Does the work happen often enough to establish a rhythm?			
Ownership	Can one person be named as accountable for the outcome?			
Trigger	Is the start of the workflow observable?			
Evidence	Can completion be demonstrated rather than assumed?			
Handoffs	Are the people and systems involved known?			
Exceptions	Can normal work be separated from cases needing judgement?			
Baseline	Is there a current measure for speed, quality or completion?			
Authority	Is the approver willing and available to participate?			

13-16: strong pilot candidate 9-12: promising, with named gaps 0-8: clarify the foundations first

PART 3 / MAP THE OPERATING LOOP

Move from signal to recorded outcome.

A dependable workflow connects four operating layers. Describe the minimum viable path for real work, then mark where judgement or an exception interrupts it.

01 ATTENTION	What signal deserves action?	Source, timing, qualification rule
02 INTELLIGENCE	What context supports the decision?	Evidence, source date, interpretation
03 EXECUTION	Who prepares, decides and acts?	Owner, approval gate, exception path
04 REPORTING	What outcome and learning are recorded?	Completion evidence, measure, next action

Decision gate

What must a named person decide before the work may continue?

PART 3B / CONTROL THE EXCEPTIONS

Design the path for work that should not flow automatically.

An exception is not a workflow failure. It is a case that needs different authority, evidence or timing. Define the rule before the first live run.

Exception rule

What makes a case unsafe or unsuitable for the normal path?

Escalation owner

Who receives the exception, and what information must travel with it?

Return condition

What decision or evidence allows the work to re-enter the normal path?

Learning loop

How will repeated exceptions change the workflow rather than becoming permanent manual work?

PART 4 / DEFINE THE PILOT

What should four weeks prove?

The pilot is not a promise of transformation. It is a controlled test of one operating loop, with authority and evidence agreed before work begins.

Week 1

Map

Trigger, inputs, owners, decisions, exceptions and baseline

Week 2

Build

Working path, safeguards, evidence record and review rhythm

Week 3

Run

Real work, corrections, exception log and observed performance

Week 4

Embed

Operating guide, ownership, results and next decision

Success measure

What observable change would justify keeping or expanding the workflow?

Stop condition

What result would tell you not to continue?

PART 5 / RECORD THE EVIDENCE

Make the result usable.

Capture evidence while the workflow runs. Do not reconstruct it at the end.

Date	Instance / trigger	Exception or correction	Outcome / measure

PART 6 / MAKE THE DECISION

What happens next?

Keep

What worked and should become part of the operating rhythm?

Correct

What needs another controlled iteration?

Stop

What should not be automated, standardised or continued?

Owner and review date

Who owns the next decision, and when will it be reviewed?

Ready to examine one real workflow?

Take the five-minute scorecard at
ignite.io/scorecard
 or email sales@ignite.io.