

Sample decision pack: triaging incoming requests.

A 30-day POC ends with a decision pack: the evidence, the recommendation and the questions to resolve before further investment. This sample follows one proof of concept, sorting incoming requests, from the question to the recommendation.

• ILLUSTRATIVE • SYNTHETIC

Illustrative example. Built with synthetic information to show the format. It is not a client result or evidence of performance in your business.

01 / THE QUESTION

Can a workflow sort requests without skipping a check?

Example Services Co. is a fictional business services company. Every request from its customers and suppliers arrives in one shared inbox. A coordinator reads each one, chooses a category and forwards it to a team.

The team wanted to know whether part of that sorting could be done by a workflow, without losing the checks a person makes today.

THE QUESTION TESTED

Can a workflow apply the five agreed categories, suggest the next owner and send uncertain requests to a person, reliably enough on test cases to justify a production build?

What a useful result would look like, agreed before the test

- ☐ Routine requests get the agreed category and owner.

- ☐ Every request that needs a person goes to a person, even when the workflow's suggestion looks right.
- ☐ Every wrong suggestion can be traced to a cause the team can fix or accept.
- ☐ The coordinator can see why each suggestion was made.

02 / THE CURRENT WORKFLOW

How requests are handled today.

This is the part of the current-state map the proof tested. A person makes every decision today. The review point marks the check the business already requires.

HOW A REQUEST MOVES THROUGH EXAMPLE SERVICES CO. TODAY

• ILLUSTRATIVE

01

Request arrives

By email or web form, into one shared inbox.

02

Coordinator sorts it

Reads the request and chooses one of five agreed categories.

03

Sensitive requests reviewed

Complaints, legal matters and personal-information requests go to the customer care lead, who decides what happens next.

HUMAN REVIEW

04

Coordinator assigns the rest

Forwards each request to the owning team.

05

Team responds

The team replies and closes the request.

Excerpt from the current-state map.

Gaps recorded on the map

- ☐ Nothing records why a request went to a team, so a misrouted request is hard to trace.
- ☐ Supplier payment questions have no agreed owner. They reach customer billing or finance, depending on who reads them.
- ☐ Forwarded email chains often carry an old request above the new one.

03 / THE PROPOSED LOGIC

What the workflow does, and where a person still decides.

The workflow reads each request and suggests a category, an owner and a short reason. It does not reply to anyone or close a request. Before anything is routed, it checks the review conditions. A request that meets any of them goes to the coordinator, with the suggestion shown as a draft.

Triage rules (excerpt)

VERSION 0.3 · CATEGORIES, OWNERS AND REVIEW CONDITIONS

CATEGORY	COVERS	OWNER
Billing	Invoices, payments, refunds and charges from customers.	Accounts team
Service change	New services, changes, moves and cancellations.	Service delivery
Account access	Logins, passwords and changes to users.	Support desk
Complaint	Dissatisfaction with a service or a person, or a request to escalate.	Customer care lead
General enquiry	Questions about the business itself, such as opening hours or locations, from a known sender.	Coordinator

SEND TO A PERSON, NOT THE ROUTING RULES, WHEN

- two or more categories apply
- the request is a complaint
- the request mentions personal information, a legal matter or a safety issue
- the sender is not in the customer or supplier list
- no category applies.

HOW TO READ THIS

Each row is one agreed category and the team that should own it. The review conditions take precedence: a request that meets any of them goes to a person, whatever category it seems to fit.

Excerpt from the triage rules the coordinator and the customer care lead agreed before the test. The rules are the part of the logic the team can read and change.

THE PROPOSED WORKFLOW

• ILLUSTRATIVE

01

Request arrives

The same shared inbox.

02

Workflow suggests

A category, an owner and a short reason.

03

Review conditions checked

Any match sends the request to a person.

04

Coordinator reviews

Confirms or corrects every suggestion sent for review. Complaints, legal matters and personal-information requests still go to the customer care lead.

HUMAN REVIEW

05

Routed and recorded

The suggestion, its reason and any correction are recorded.

In the proof, nothing was routed to a real team. A request that meets no review condition would skip step 04; in the test, every suggestion was checked against an agreed answer.

04 / HOW IT WAS TESTED

The answer was agreed before the test ran.

WHAT WAS COMPARED

For each case, the workflow's suggested category, owner and review decision, against an agreed answer. The help desk's built-in routing rules were not compared.

THE CASES

Twelve synthetic requests, written to cover routine requests and the hard ones on the current-state map: two categories, missing detail, forwarded chains, complaints and personal information. In a real POC, the team supplies representative requests, kept separate from the examples used to write the rules.

WHAT COUNTED AS CORRECT

The suggested category and owner both match the agreed answer, or the request goes to a person when the agreed answer says it needs one. A request that needed a person but was routed without one is a failure, even if its category was right.

WHO REVIEWED

The coordinator and the customer care lead wrote the agreed answer for each case before the test ran. The customer care lead reviewed every result and the failure notes.

Twelve cases, including the ones that failed.

Each row is one synthetic request. Case 07 is one the workflow must never route by itself. Cases 08, 10 and 12 failed. The cases were written to show each kind of outcome, so the mix says nothing about how often each would happen in practice.



The twelve cases at a glance. The mix was chosen to show each outcome, not to estimate a rate.

CASE	REQUEST	SUGGESTED CATEGORY	SUGGESTED OWNER	OUTCOME
01	Charged twice for the same invoice. Asks for a refund.	Billing	Accounts team	MATCHED Agreed category and owner.
02	Wants to move next week's service visit to a later date.	Service change	Service delivery	MATCHED Agreed category and owner.
03	Locked out after a password reset and needs access today.	Account access	Support desk	MATCHED Agreed category and owner.
04	Asks whether the office is open on public holidays.	General enquiry	Coordinator	MATCHED Agreed category and owner.

CASE	REQUEST	SUGGESTED CATEGORY	SUGGESTED OWNER	OUTCOME
05	Wants to cancel the service and asks for a final invoice.	Service change, Billing	Service delivery (draft)	SENT FOR REVIEW Two categories apply. A person decides the order, as agreed.
06	Unhappy with a technician's visit and asks to speak to a manager.	Complaint	Customer care lead (draft)	SENT FOR REVIEW Complaint. It went to a person, as the rules require.
07	Asks for a copy of all the personal information held about them.	No category	Customer care lead (draft)	SENT FOR REVIEW Personal-information request. It went to the customer care lead, as the rules require.
08	A supplier asks when an overdue invoice will be paid.	Billing	Accounts team	FAILED Wrong category. Billing covers customers only, and the rules have no category or owner for supplier requests, so it should have gone to a person. Rule gap noted.
09	One line: 'Please call me back.' No other detail.	No category	No owner	SENT FOR REVIEW No category applies. It went to a person, as agreed.
10	A forwarded email chain. The new request, to add a user, sits below an old billing thread.	Billing	Accounts team	FAILED Wrong category. The workflow read the old message in the chain. Rule gap noted: read the newest message first.

CASE	REQUEST	SUGGESTED CATEGORY	SUGGESTED OWNER	OUTCOME
11	Asks to add a new user to their account.	Account access	Support desk	MATCHED Agreed category and owner.
12	Asks to change a contract term and says they are seeking legal advice.	Service change	Service delivery	FAILED Routed without review. The legal mention should have sent it to a person. This blocks production until it is fixed and retested.

Test cases for the triage proof: the workflow's suggestion and the outcome against the agreed answer.

Matched: the suggestion agreed with the answer. **Sent for review:** the workflow gave the request to a person, as the answer required. **Failed:** the suggestion was wrong, or a request that needed a person was routed without one.

What the results show

Five routine requests (cases 01 to 04 and 11) matched the agreed answer. Every request the review conditions caught went to a person, including the personal-information request in case 07.

Three cases failed, for three different reasons:

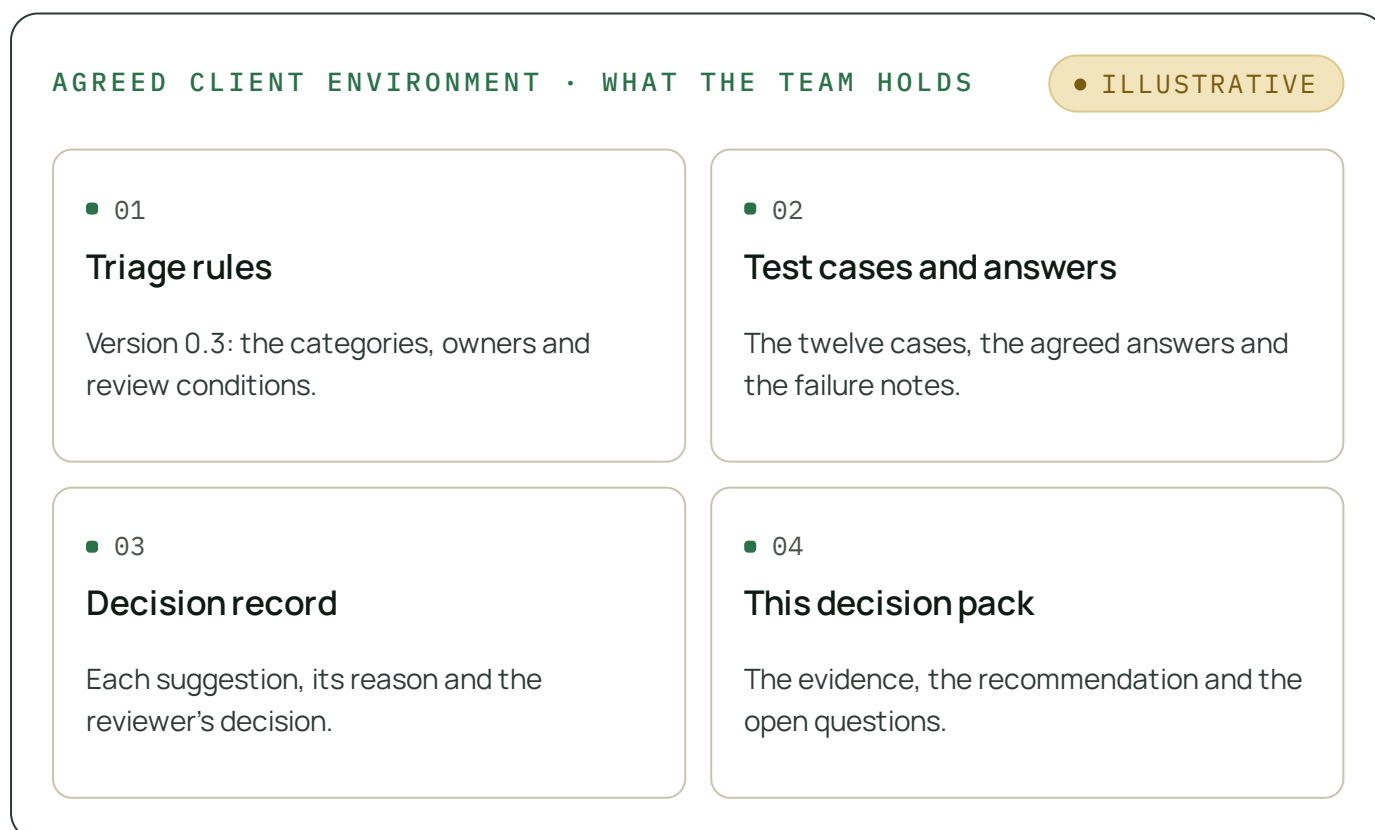
- **Case 08.** The rules have no category for supplier requests. That is a gap in the process as well as the rules.
- **Case 10.** The workflow read the old message in the chain.
- **Case 12.** A legal mention did not trigger a review condition, so the request was routed without a person seeing it. This is the failure that matters most: the workflow must never skip a check the business requires.

What this test cannot tell you.

- ☐ Twelve written cases are not a sample of real requests. They show the kinds of outcome, not how often each happens.
- ☐ The coordinator's current error rate was not measured, so there is no baseline to compare against.
- ☐ Only English text in the body of a message was tested. Attachments and images were not read.
- ☐ Volume, response time and running cost were not measured.
- ☐ The help desk's built-in routing rules were not compared on the same cases.
- ☐ The review conditions do not yet cover all legal and safety wording (case 12).

What the team holds, and what the proof depends on.

A decision pack records what the business holds when the proof ends and which services it still relies on. Each of those services has its own terms, access and costs.



SERVICES THE PROOF DEPENDS ON

- ☐ Shared inbox and email service
- ☐ Help-desk software
- ☐ Hosted model service
- ☐ Customer and supplier lists in the CRM

The scope names what is handed over. The services outside the boundary stay under their own terms and costs, and a production build would need their access agreed.

08 / WHAT PRODUCTION WOULD NEED

What production would still need.

The proof is not production. A build would be scoped separately, and it would need at least the following.

- ☐ A named owner for the workflow, and an agreed owner for supplier payment questions.
- ☐ Review conditions that cover legal and safety wording, and forwarded chains read from the newest message.
- ☐ A retest on real requests supplied by the team, kept separate from the examples used to write the rules.
- ☐ Integration with the help desk, so suggestions appear where the coordinator already works.
- ☐ Access agreed for the email service, the help desk and the model service.
- ☐ A privacy check of how requests containing personal information are handled and recorded.
- ☐ Monitoring: a regular comparison of suggestions with the coordinator's corrections, and a named person who acts on it.
- ☐ A way to switch the suggestions off and return to sorting by hand.
- ☐ Operating instructions, and a handover to the coordinator and the customer care lead.

Handover note, triage proof (excerpt)

CLOSES THE PROOF · LISTS WHAT IS HELD, BY WHOM, AND WHAT IS OPEN

HANDED OVER

Triage rules version 0.3, the twelve test cases with agreed answers, the test results and failure notes, the decision record from the test, and this decision pack.

OWNER AFTER HANDOVER

The customer care lead.

OPEN ITEMS

Supplier category and owner (case 08). Forwarded chains (case 10). Legal and safety wording (case 12). Comparison with the help desk's routing rules.

NOT INCLUDED

Production integration, monitoring and support after the proof. These would be scoped separately if a build goes ahead.

HOW TO READ THIS

The note lists what the team holds when the proof ends, who owns it and what is still open. Every open item points back to a test case or a limit in this pack.

Excerpt from the handover note that closes the proof.

Change the process now. Build only if two conditions are met.

Change the process

NOW

Agree who owns supplier payment questions. The gap exists with or without a build.

Build

ONLY IF BOTH CONDITIONS ARE MET

After the rules are changed, a retest on real requests sends every request that needs a person to a person, and the help desk's built-in routing cannot handle the same cases as well.

Buy

IF THE RETEST FAVOURS IT

Configure the help desk's built-in routing instead, if it handles the same cases as well on the retest.

Stop

IF A CHECK IS SKIPPED

If the retest still routes a request that needs a person without review.

Questions to resolve before further investment

- ☐ Who owns supplier payment questions?
- ☐ Which requests, if any, may be routed without a person confirming them?
- ☐ Can the help desk's built-in routing handle the same cases?
- ☐ Who will monitor the workflow, and what will they do when its suggestions drift?

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