

Define the work

A fillable planning workbook for operations, finance, and technology teams. Start with a recurring problem and leave with a reasoned next step.

Save a local copy before completing it. This file does not send your answers to Clairvance. Use role titles and non-sensitive descriptions; do not paste confidential records. The method is a planning aid, not a validated benchmark.

Workflow and business outcome

Name the work and the result that matters, such as a complete order ready for review.

Trigger and completed state

Business owner and people doing the work

Main steps, handoffs, and systems

Exceptions: where does the work leave the normal path?

What is outside the first implementation?

Collect evidence before estimating

Use records and observation where possible. Mark an estimate as an estimate and state what needs checking.

Observation period, item volume, and sample size

Active handling minutes per item, including review and corrections

Elapsed time from trigger to completion; identify waiting separately

Rework, missing information, and exceptions: counts and types

Evidence source and limitations

Record the log or observation, the person collecting it, and whether the sample is representative.

Planning arithmetic

Handling hours = item volume x average handling minutes / 60. Compare like periods and eligible work. Record continuing review and exception effort in the proposed process. Time released is capacity; cash savings need a separate, specific change in expense.

Baseline to verify and who will verify it

Keep value and readiness separate

Compare a small number of candidates. A high potential value should not conceal missing ownership, access, or testable outputs.

For each candidate record: business outcome; evidence of volume or cost; available inputs and access; reviewer capacity; the strongest simpler alternative; and the largest unknown. Use “unknown” when evidence is missing.

Candidate A: value, feasibility, readiness, alternative, and unknown

Candidate B: value, feasibility, readiness, alternative, and unknown

Candidate C: value, feasibility, readiness, alternative, and unknown

Readiness checks

Is there a business owner? Can you obtain representative examples with permission? Can you define a correct output? Can the team review exceptions? Can the technical owner support the required access? If a condition is missing, identify a concrete discovery action before building.

Chosen candidate and why; evidence that could change the choice

Set the first implementation boundary

Describe a controlled first use. Acceptance, ownership, and fallback need to be agreed before launch.

Approach: process change, existing feature, integration, product, or AI

Pilot coverage: inputs, systems, participants, and excluded cases

Acceptance: output quality, review effort, and wrong-action limits

Human review, escalation owner, and prohibited actions

Failure recovery: how to stop, preserve work, and return to a manual route

Launch decision, ongoing owner, and date to review evidence

Test ordinary cases, missing information, conflicting references, duplicates, unavailable systems, and unauthorized requests. Decide what evidence would justify expansion; record unresolved risks rather than hiding them in an average.

Turn the worksheet into a decision

Use the completed pages to choose an implementation, gather more evidence, or reject a weak candidate.

Illustrative distributor-order example

Assume 1,200 eligible items per month with an observed average of 8 handling minutes per item. Baseline handling effort is $1,200 \times 8 / 60 = 160$ hours per month. A proposed process averaging 5 minutes, including review and exceptions, would require 100 hours. The modeled difference is 60 hours of capacity.

These constructed values are not client results or a forecast. The pilot must test whether the proposed time is achievable, whether enough items are eligible, and whether the team can use the capacity. Software and maintenance costs still belong in the business case.

Decision	Evidence that supports it
Proceed to a bounded pilot	Clear owner and outcome; necessary access; representative test cases; workable review and fallback.
Gather evidence or simplify	Potential value is credible but baseline, access, or option fit remains uncertain.
Defer or stop	The burden outweighs the benefit, a critical requirement is unmet, or a simpler change resolves the need.

Three next actions: action, responsible role, evidence, and date

Use the workbook with your team

Bring the business owner, someone doing the work, and the technical owner together. Agree the next decision and the information needed to make it. Clairvance can help examine the workflow and compare practical implementation options.

[Review a workflow with Clairvance](#) | Original Clairvance planning method, September 2026.