WORKING TEMPLATE / 01

Buyer and offer map

Choose one customer and the decision the offer supports.

Use confirmed facts, mark unknowns and agree the next owner and date.

Business / buying entity

Priority customer and service area

Commercial job the buyer wants done

Current alternatives the buyer compares

Offer scope and exclusions

Relevant approved proof

Useful first output

Decision owner and implementation owner

Evidence still needed

Next action, owner and review date

WORKING TEMPLATE / 02

Job mix and recurring work brief

Agree which work the business wants more of.

Use confirmed facts, mark unknowns and agree the next owner and date.

Service line and period reviewed

Job / contract categories

Completed jobs or active contracts by category

Net revenue and direct cost basis

Travel, subcontracting, rework and support

Repeat mechanism and renewal basis

Minimum viable scope

Available delivery capacity

Preferred and excluded customer profiles

Decision and next action

WORKING TEMPLATE / 03

Enquiry to quote process

Identify one process and the evidence required to improve it.

Use confirmed facts, mark unknowns and agree the next owner and date.

Service line and cohort dates

Valid enquiry criteria and exclusions

Qualification owner

Quote scope, version and issued date

Decision window and open records

Follow-up owner and next action

Won, lost and deferred definitions

Outcome evidence and reasons

Missing records / duplicate handling

Agreed change and review date

WORKING TEMPLATE / 04

Repeat service journey

Design a relevant, permission-aware next service.

Use confirmed facts, mark unknowns and agree the next owner and date.

Customer / service eligibility

Appropriate next service and timing

Consent source, scope and withdrawal status

Required customer information

Offer, terms and exclusions

Sender identity and stop-contact route

Fulfilment owner and available capacity

Completed work and direct contribution

Comparison period / other changes

Review decision and owner

WORKING TEMPLATE / 05

Owner task and decision handover

Clarify one task the team can take on consistently.

Use confirmed facts, mark unknowns and agree the next owner and date.

Task and current owner

Weekly volume and measured time

Decisions requiring owner authority

Rules another team member can use

Required inputs and exception route

New responsible owner

Trial scope and dates

Rework and completion evidence

Hours released; separately evidenced cash effect

Approval and next review

WORKING TEMPLATE / 06

First meeting and paid diagnostic brief

Carry a useful conversation into a bounded scope.

Use confirmed facts, mark unknowns and agree the next owner and date.

Buying entity and relevant sponsor

Agreed meeting purpose and topic

Confirmed facts and sources

Buyer-reported facts

Unknowns and commercial constraints

Required client inputs and permissions

Diagnostic deliverables and exclusions

Fee, direct effort and capacity

Completion / acceptance criteria

Next decision, responsible owner and date