WORKING TEMPLATE / 01

Account and workflow brief

Define the record, buying entity and useful next decision.

Separate verified sources, buyer statements and unknowns.

Buying entity, country and operating site

Record family and process owner

Starting event and approved outcome

Current authoritative systems

Verified fact, source, period and access level

Buyer statements and unanswered questions

Useful first artifact and limit

Contact route and suppression status

Account and delivery owners

Next decision, owner and date

WORKING TEMPLATE / 02

Use-case and demo brief

Explain the workflow before showing the product.

Separate verified sources, buyer statements and unknowns.

Team and record family

Current handoff and business question

Intake and identity

Review, approval and rejection

Approved-state write-back

Retrieval and evidence package

Synthetic demo scenario

Supported, configurable and unknown scope

Required attendees and decision rights

Proposed next output

WORKING TEMPLATE / 03

Contract-unit dictionary

Keep business volume and billable units distinct.

Separate verified sources, buyer statements and unknowns.

Monthly workflows and definition

Documents per workflow

Signature events per document

Billable packet definition

Additional, cancelled and retry units

Included units and overage rate

Base fee and recurring extras

One-time implementation and validation

Excluded costs and commercial owner

Worked example and approval date

WORKING TEMPLATE / 04

Control-to-test map

Map applicable requirements to configuration and evidence.

Separate verified sources, buyer statements and unknowns.

Record and intended use

Applicable rule and buyer owner

Control requirement and source

Product capability to demonstrate

Configuration and operating procedure

Positive test and expected result

Rejected or unauthorised action test

Evidence location and retention

Gap, severity and responsible owner

Acceptance decision and date

WORKING TEMPLATE / 05

Integration and migration scope

Trace a record and reconcile its history.

Separate verified sources, buyer statements and unknowns.

Source system and stable case identity

Approved interface and access owner

Fields, versions and approval events

Idempotency, retries and reconciliation

Migration inventory and exclusions

Sample, count and content checks

Role and retention mapping

Restore and incident responsibilities

One-time and recurring effort

Acceptance test and sign-off

WORKING TEMPLATE / 06

Buyer cost and ROI brief

Separate capacity, cash, elapsed time and recurring cost.

Separate verified sources, buyer statements and unknowns.

Monthly workflow cohort and currency

Primary active handling minutes

Additional rework rate and minutes

Cash-realised share and evidence

Retired costs with no overlap

Contract units and recurring cost

One-time implementation and validation

Negative-benefit and rollout scenario

Simple payback and exclusions

Buyer owner and review date

WORKING TEMPLATE / 07

Pilot design and readout

Agree denominators and required controls before launch.

Separate verified sources, buyer statements and unknowns.

Site, workflow, cohort and period

Sponsor, IT and quality owners

Eligible cases and exclusions

Completed and right-first-time cases

Complete-evidence cases and definition

Retrieval requests and SLA definition

Active handling and elapsed time separately

Comparable baseline and data limitations

Mandatory controls and stop conditions

Accept, extend or stop decision

WORKING TEMPLATE / 08

Meeting and partner handoff

Preserve context and decision ownership.

Separate verified sources, buyer statements and unknowns.

Relevant buying entity and workflow

Contact role and agreement to discuss

Named process question and first artifact

Source evidence and unverified assumptions

Permitted route and stop instructions

Account, partner and delivery owners

Supported scope and known gaps

Budget and architecture questions for later

Agreed next output and attendees

Time, timezone, owner and date