01 / DECISION BRIEF

A clearer next move.
A plan you can execute.

An industrial distributor | Quote to order | Fictional example

FIRST PRIORITY

Validate approved quotes before ERP entry

01 What we would investigate

Where information is re-entered, which records are trusted, who handles an exception, and what evidence confirms completion.

02 What the first build should do

Approved quote becomes a erp draft order. Required data is validated, the owner sees exceptions, and release stays under human control.

03 What should wait

Avoid a platform replacement or an AI layer until the source data, approval rules, and first workflow are dependable.

This sample shows the depth and structure of an audit. A paid audit uses your interviews, system inventory, workflow evidence, constraints, and priorities. The examples and numbers in this document are invented for illustration.

02 / THE PACKAGE

Eight useful outputs.
One decision-ready handoff.

Your tailored findings arrive in a branded PDF, with working templates you can adapt.

01
Decision brief
What to fix first, what to defer, and why.

02
Current-state map
Systems, handoffs, owners, delays, and evidence gaps.

03
Target workflow
Triggers, required data, actions, approval gates, and exceptions.

04
Priority backlog
Impact, effort, confidence, dependencies, and suggested owner.

05
Value worksheet
Baseline assumptions, expected capacity, costs, and sensitivity.

06
90-day roadmap
Sequenced milestones, accountable owners, and completion checks.

07
First-build brief + DIY guide
Field mapping, operating checklist, pilot tests, and fallback.

08
Working handoff
Editable backlog and roadmap templates, plus a findings walkthrough.

Standard starting scope: one business unit, up to three priority workflows and five core systems. Discovery, a findings walkthrough, and the first-build brief are included. We confirm coverage, access, and delivery timing before payment. Implementation and software are scoped separately.

03 / CURRENT-STATE DIAGNOSTIC

Find the handoff that creates the work.

Sample process: Quote to order. Validate these observations with the people doing the work.

Step / source	Handoff risk	Evidence to collect
Approved quote / CRM quote	Details are copied into a second tool.	A small sample of completed records and the matching destination records.
Validation / people	Required fields or definitions are inconsistent.	Field list, correction history, and actual approval rules.
ERP draft order / ERP order	The receiving owner must chase missing context.	Timestamp of acceptance, ready status, and first owner action.
Exception / shared inbox	No named owner or explicit retry state.	Exception examples, resolution time, and who follows up.

Baseline before changing anything

Record volume, manual touch time, rework, and waiting time separately. Interview the process owner and the receiving team. Observe examples; do not infer the whole process from a tool list.

04 / TARGET WORKFLOW

A connected process with a visible owner.

Illustrative design. Confirm system capabilities and permissions during discovery.

TRIGGER

Approved quote

CRM quote

↓

VALIDATE

Check required data

Source ID + version + required fields

↓

PREPARE

ERP draft order

ERP order

↓

APPROVE

Human release decision

Order desk lead

EXCEPTION BRANCH: stop, assign, resolve

Unknown SKU or a price mismatch. Order desk reviews the exception before order release. Store the source ID and reason; retry only after the correction. Never silently drop failed work.

05 / PRIORITY BACKLOG

An order of work.
A reason for every choice.

These are sample rankings. Your audit uses evidence from your business to set priorities.

Opportunity	Potential impact / effort	Dependency
01 / Define customer and SKU crosswalk	High / low	Agree source fields
02 / Pilot quote validation and draft order creation	High / medium	Pass data checks
03 / Create a daily exception review queue	Medium / low	Pilot owner assigned
04 / Connect inventory exceptions after the pilot	Medium / medium	Stable first workflow
05 / Consider AI for product-document retrieval	Unproven / medium	Approved source library

Decision lens: impact = reach and burden reduced; effort = build and adoption complexity. Confidence should be marked low, medium, or high from observed evidence. Resolve data and ownership dependencies before adding automation.

Why the first recommendation may not need AI

Deterministic fields and known business rules usually call for validation and integration. Consider AI for ambiguous documents or language only when review, source access, and measurable quality checks are defined.

06 / VALUE WORKSHEET

Show the assumptions. Then decide what is worth it.

Illustrative planning arithmetic. Replace every input with measured data before budgeting.

Input / calculation	Example	Interpretation
Monthly volume	240	Accepted records, not every system event
Manual minutes before / after	14 / 5	After-state is a hypothesis to test
Gross hours released	36.0	240 × (14 − 5) ÷ 60
Monthly control / review effort	4 hours	Subtract the work needed to operate the process
Net capacity released	32.0 hours	Gross hours minus ongoing review
Planning value of capacity	$1,216/month	Net hours × assumed $38/hour
Illustrative recurring tool cost	$80/month	Verify the actual licensed tools and usage

Scenario only: a $1,997 audit plus an assumed $3,000 implementation, divided by capacity value less tool cost, gives about 4.4 months. This is a capacity-value comparison, not a cash-payback forecast. At half the assumed time reduction, the case is materially weaker.

Do not count time twice: cash savings exist only when actual spending decreases. Released capacity may instead support growth, service, or reduced backlog. Include adoption, rework, maintenance, and remaining manual effort.

07 / EXECUTION ROADMAP

The next 90 days, with a definition of done.

The audit supplies this plan. Implementation follows your chosen scope and resources.

Phase	Work / accountable owner	Completion check
Days 01-30	Map the source fields; observe the process; confirm owner and baseline. Process owner + systems lead	Source-of-truth field list and baseline accepted by both sending and receiving teams.
Days 31-60	Build the narrow pilot; test exceptions and replays; train the owner. Systems lead + process owner	Each agreed happy-path and failure-path test has a recorded result and owner sign-off.
Days 61-90	Expand only after the pilot gate; review actual capacity and exceptions weekly. Business sponsor + process owner	Measured results reviewed; operating checklist handed over; next priority approved.

Go / no-go gate

Do not expand when ownership is missing, duplicate records appear, or errors are invisible. Resolve the failed check, rerun the pilot, and record the decision. Keep the previous manual process available during rollout.

08 / FIRST-BUILD BRIEF

Enough detail to start. Enough control to own it.

Validate approved quotes before ERP entry. Sample brief for the first prioritized workflow.

Required fields: Quote ID, revision, customer ID, SKU, quantity, price, ship-to address.
Accountable owner: Order desk lead.
Measure: Manual touch minutes per accepted order; track exception rate and rework alongside it.

PILOT ACCEPTANCE CHECKS

01 An unknown SKU creates a review task; it does not create an order.

02 A replay of the same quote revision never creates a duplicate order.

03 A price change requires human approval before order release.

04 A disconnected ERP leaves a visible retry item with its source record.

DIY OPERATING CHECKLIST

Review the exception queue each business day. Confirm each item has an owner and a reason. Reconcile source and destination counts. Record changes to mappings. Keep a simple change log. Pause the workflow and use the documented manual handoff when a critical check fails.

Choose who executes the plan

DIY with your team, guided implementation, or Bridge Road specialist support from $6,000-$8,500/month with no term contract. Execution scope and software are separate from the audit. Start at bridgeroadmarketing.com/operations/