CLIENT WORK CAPACITY CHECK

Worked case: more work, the same review queue

A fictional worked case and six editable worksheets to find where the next engagement will consume senior time, what defined work could be carried by a system, and how added capacity could become accepted and collected value. Use case IDs or anonymised descriptions. This is a decision aid, not an installation, client diagnosis or savings forecast.

Fictional illustration - no client result

A boutique completes 40 comparable engagements a year. Its senior reviewer records 18 active hours per accepted case. The work includes six hours finding and preparing evidence, five reviewing, three coordinating and four correcting. Forty cases therefore consume 720 senior hours across these activities. This is an invented baseline, not a benchmark or a promised saving.

Work per accepted case	Senior hours	Question to investigate
Evidence and preparation	6	Could permitted sources and an approved method arrive ready?
Review	5	How much is professional judgement versus rebuilding context?
Coordination	3	Which requests and next steps have clear rules and owners?
Correction	4	Which errors can checks detect before review?

The firm should not count all 18 hours as removable. It must keep qualified judgement, test any new preparation and include the time spent checking, correcting and operating the system. Even a net time gain is only capacity until demand, price and collection make its value real.

Leave with one useful constraint first

Name one service, one task that returns to a person, its owner and one evidence check. Your takeaway: "In our service, this repeated task consumes effort before accepted work. Ask the owner to trace one case and check whether a simpler method, existing tool or AI preparation could help." This is the same synthetic 40-case/18-hour Northbank baseline as the complete sample; the activity and stage views count the hours differently, once each.

Use the deeper pages only if useful

Map a complete case. Count effort once. Identify repeatable work and decisions. Check permissions. Name the economic destination. Decide the next useful test.

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1. Trace the work that earns the fee

Choose one representative case from an important revenue path. Include a returned case if the ordinary case hides the strain.

Stage	Input / accepted result	Owner / return path
Enquiry and scope		
Prepare and produce		
Qualified review		
Acceptance		
Invoice and collection		
Permitted reuse		

Where did work wait, return or start again?

Record the event and its consequence. Waiting time is different from active labour; both may matter, but do not add them together as hours worked.

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2. Count the complete senior load

Count preparation, review, correction and coordination on the same case. Use records where available; label recalled values as estimates. Count each hour once.

Activity	Role / hours	Evidence or missing record
Find and prepare context		
Apply method / produce work		
Review and approve		
Correct returned work		
Coordinate and operate		

Total effort per accepted case

Current senior hours: _____. Other team hours: _____. Elapsed days: _____. Accepted output and case class: _____.

Do not compare a simple case before the change with a complex case after it. Keep scope and case mix visible.

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3. Separate defined work from judgement

Find work with repeatable inputs, an approved method, a reviewable result and a named owner. Keep professional conclusions, rights and consequential approvals with authorised people.

Candidate work	Accepted result / check	Best first mode to compare
		Process / existing tool / rule / AI
		Process / existing tool / rule / AI
		Process / existing tool / rule / AI

What must remain a human decision?

Name the decision, qualified reviewer and what they need in order to approve, limit, reject or hold the work.

What would make the system create more work?

Record likely extra checking, correction, setup or coordination. These costs belong in the test.

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4. Check the evidence and operating boundary

A useful idea still needs permissible sources, a stable method, available owners and a way to handle missing evidence.

Readiness check	Yes / no / unknown	Owner and next check
Source use and reuse rights		
Approved method and versions		
Named reviewer and deputy		
Existing tool / simpler route checked		
Missing evidence / rejected output path		
Interruption / manual fallback		

The material blocker

What evidence, permission or owner is missing? Who can resolve it, by when, and what decision changes if it stays unresolved?

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5. Give added capacity a real destination

After a trial, net hours released equal baseline effort minus new preparation, review, correction and operating effort for comparable accepted cases. Before a trial, leave the gain unknown or explicitly estimated.

Possible destination	Evidence needed	Actual record / unknown
Additional accepted work	Demand and remaining case constraints	
Avoided cash cost	Overtime, contractor or planned cost avoided	
Higher-value redeployment	Named work and realised value	
Unmonetised capacity	Useful time with no cash claim	

The money check

Additional contribution requires collected fees minus the incremental delivery and system costs. Do not treat an invoice as collected cash. In hourly billing, fewer billed hours can reduce fees. Do not count the same hour as both cash savings and additional case capacity.

Demand for additional cases: _____. Contribution method and finance owner: _____. First receipt needed to establish value: _____.

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6. Choose the next useful decision

The constraint in one sentence

When _____ happens, _____ work consumes _____ effort or delays _____. The owner is _____.

The first comparison

What current process, existing software or deterministic rule should be compared with an agent-based design? What result, quality limit and complete effort measure decide whether it is useful?

Move from a case to a firm-level design

A free Firm Capacity Fit Call checks the constraint, likely opportunity, owners and next step. If appropriate, the paid Firm Capacity Blueprint maps one important revenue path across the firm, fully designs three connected improvements and ranks the first installation. You keep the usable design. Installation has its own scope, tests and price; simpler software or no build can be the right answer.

Request a no-fee call: https://www.buildnbloom.io/contact?lm=capacity#new-work

Do not send confidential client files. This worksheet does not establish a time saving, financial return, installation readiness or professional acceptance.