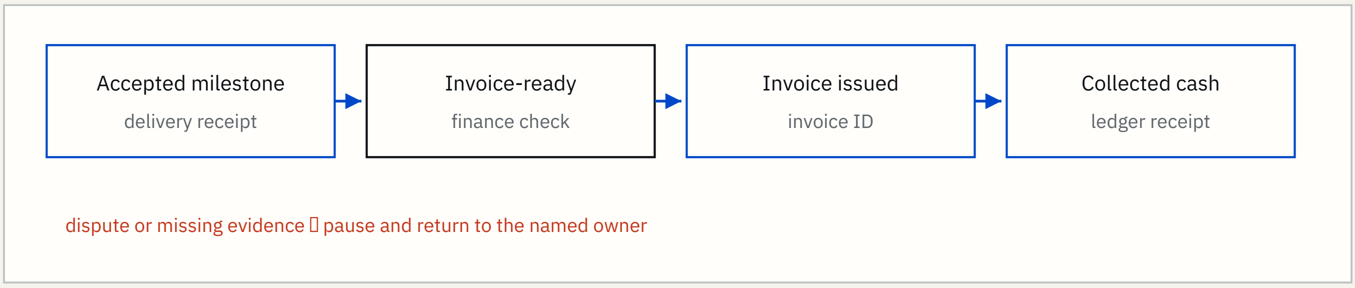
MILESTONE-TO-CASH HANDOFF CHECK

1. Choose one milestone type

A blank worksheet for one recurring milestone in a service your firm already sells. Follow the evidence from accepted work into invoice readiness, issue and collection. Use anonymised case IDs. An invoice is not collected cash; faster processing is not a financial result by itself.

Start from the signed commercial condition and the actual acceptance receipt. Delivery acceptance, invoice issue and collection are separate states with different decision owners.



Milestone record

Field	Your entry
Existing paid service / milestone type	
Trigger and signed contract condition	
Acceptance evidence and authorised approver	
Delivery owner / finance owner	
Receiving accounting or ledger record	
What is excluded from this check?	

Case boundary

One anonymised case ID: __________. Agreement version: __________. Period: __________.

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2. Check the handoff record

For each requirement, mark present, missing, disputed or not applicable. Keep version and receiving-system proof with the item. Do not infer that finance acted merely because delivery sent a pack.

Case ID: __________ | milestone date: __________

Required item / condition	Source and version	Status P/M/D/N	Sender ▯ receiver / receipt
Signed milestone/payment term			
Deliverable issue version			
Acceptance receipt / approver			
Agreed fee or time evidence			
Tax, entity and invoice fields			
Client PO or billing reference, if required			
Invoice-ready confirmation			
Invoice ID and issued date			

What is not yet ready?

The next owner needs __________. The missing or disputed item returns to __________ by __________.

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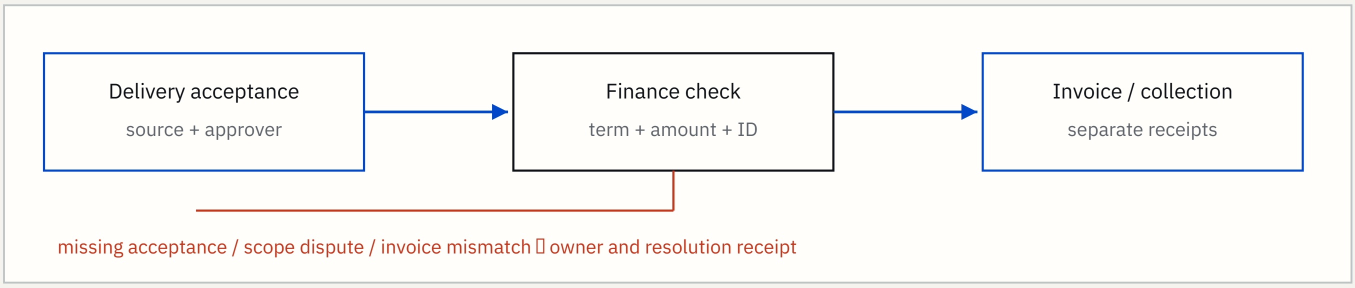
3. Draw the return routes

A blocked milestone returns to the owner who can resolve that exact issue. Finance or an authorised partner retains invoice, collection, dispute and write-off decisions. A candidate Commercial Analyst exception summary has a finance-scoped identity and corpus; it never inherits sales access by default.



Named owner and receipt for each route

Exception	Resolver / decision owner	Pause rule and resolution receipt
Missing acceptance evidence		
Scope or fee disagreement		
Invoice field mismatch / duplicate		
Client dispute or partial payment		
Collection action or write-off		

First blocked case to walk

Case ID: __________. Where it paused: __________. Who can restart it: __________.

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4. Measure the handoff without assuming revenue

Use one defined period and a consistent case mix. Record elapsed days from acceptance to invoice-ready separately from active staff time. Reconcile every invoice with an acceptance receipt and collection or dispute state.

Period: __________ | eligible milestone count: _____ | case mix: __________

Case ID	Accepted date ▯ invoice-ready date	Corrections / active h	Invoice ID ▯ collection/dispute state
	__________ ▯ __________	_____ / _____ h	
	__________ ▯ __________	_____ / _____ h	
	__________ ▯ __________	_____ / _____ h	
	__________ ▯ __________	_____ / _____ h	
	__________ ▯ __________	_____ / _____ h	
	__________ ▯ __________	_____ / _____ h	

Reconciliation

Eligible _____; invoice-ready _____; invoiced _____; collected _____; disputed _____; authorised write-off _____. Explain any gap before drawing a conclusion.

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5. Compare the improvement routes

A clearer contract/acceptance method may beat software. Compare method repair, handoff record, incumbent configuration, deterministic matching and a bounded exception summary against the same ordinary and failure cases.

Repeated issue: ____

Route	Evidence it could help	Permission / approval boundary	Test / fallback owner
Clarify acceptance criteria			
Improve delivery ▯ finance record			
Configure existing accounting/CRM			
Deterministic matching			
Bounded exception summary			
Keep current method / defer			

Test the hard cases

Include unaccepted milestone, changed terms, duplicate retry, dispute and partial payment. Record source, tool path, human decision and receiving result for each.

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6. Make the next decision

A change is justified only when ownership, rights, quality and a measurable problem align. Do not price faster invoicing as cash acceleration without a finance-approved method and actual collection evidence.

Decision record

Item	Your entry
Next record or owner to verify	
Measurement window and case mix	
Current strongest blocker	
Least burdensome route worth testing	
Condition that would stop a change	
Named delivery, finance and commercial owners	

Take this to a conversation

If accepted work regularly stalls between delivery and finance, request a Workflow Fit Call at https://www.buildnbloom.io/contact#new-work. A founder reviews the request before offering a time. If there is fit, the paid System Blueprint is quoted separately; a simpler process or system correction may still be the answer.

Where this sits in the service

This check follows an accepted milestone to collected cash (C3). It depends on the delivery acceptance receipt and the agreed scope and terms; those are separate evidence handoffs.