PARTNER-READY PROJECT MAP

Worked example: the returned finding

A fictional worked example followed by six blank worksheets for one service your firm already sells. Compare an ordinary case and a returned case to find where evidence, review and ownership slow a decision pack. Use case IDs or anonymised descriptions; do not enter confidential client names. This is a decision aid, not an installation or savings estimate.

Fictional assessment, not a client result. The signed job asks for a reviewed finding on six sampled shift handovers. A supervisor reports six sign-offs; the supplied register records four. The consultant must preserve both accounts and ask a qualified reviewer what conclusion is supportable.

Compare the two paths

Moment	Ordinary case	Returned case
First submission	Source IDs and limits travel with the draft	Draft states all six were signed without showing the register
Review	Partner checks the cited records and decides	Partner returns the draft for two missing records and a named owner
Correction	No return needed in this example	Evidence owner records the request; analyst narrows the finding
Acceptance	Reviewer decision and issue version recorded	Hold or limited finding; reviewer decision remains open until recorded

The decision this example supports

The first useful change is a source-and-exception handoff before partner review. It is not proof that AI or a new system is needed. On your own cases, compare active preparation, correction and review time with elapsed waiting; confirm whether the same avoidable return repeats.

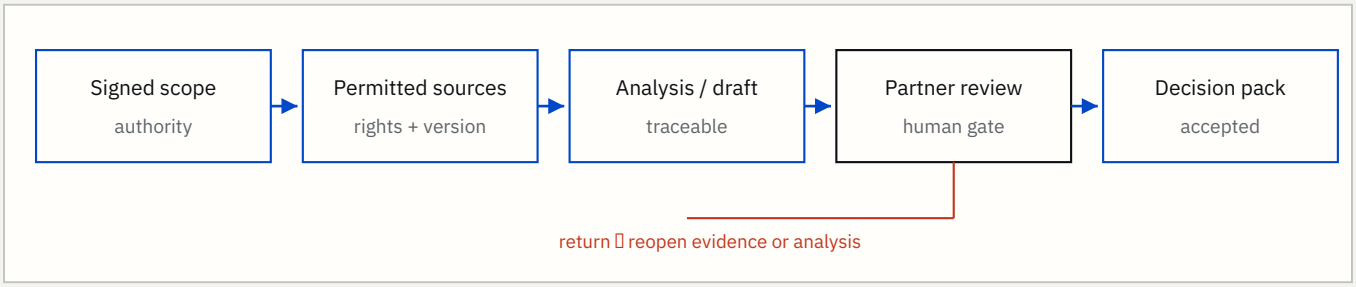
Five-minute start

Choose one paid service. Take one recent ordinary case and one returned case. Mark the first point where the reviewer needed information that was missing from the submitted pack. Then complete pages 2–7 using anonymised case IDs.

PARTNER-READY PROJECT MAP

1. Choose the service and accepted result

Write the boundary before timing tasks. A “partner-ready pack” means a complete candidate for a qualified person's review; the partner still decides the professional conclusion and issue.



Service record

Field	Your entry
Existing paid service and typical case	
What signed scope requires	
Case-mix differences that matter	
Accountable partner / delivery owner	
Pack the client ultimately receives	
Start event / accepted end event	

One thing to exclude

Name work outside this service or material you cannot inspect under current permissions.

PARTNER-READY PROJECT MAP

2. Trace one ordinary case and one returned case

Use a dated sample period. Record active effort in minutes or hours; record elapsed waiting separately. If time is estimated, write “estimate” beside it. A returned item reopens a named step and its correction time is counted once.

Ordinary case | case ID: _____ | period: _____

Stage / trigger and input	Owner / record	Active time / wait	Output / receiver
Signed scope □ source intake		_____ h / _____ d	
Evidence □ register		_____ h / _____ d	
Analysis □ traceable finding		_____ h / _____ d	
Draft □ partner review		_____ h / _____ d	
Review □ issue decision		_____ h / _____ d	

Returned case | case ID: _____ | period: _____

Returned at / reason	Reopened owner / record	Correction active time	Reaccepted by / receipt
		_____ h	
		_____ h	

Comparison note

Which step differed, and was the difference a method issue, missing input, rights question or professional judgement?

PARTNER-READY PROJECT MAP

3. Mark evidence and authority

A source is usable only when its version, rights and relevance are known. Separate a preparer's contribution from the professional decision. A missing or revoked source stops the affected step; it does not silently remain in a citation.

Source and rights register

Input / source ID	Version / location	Permission and owner	If missing, stale or denied
Signed scope / terms			
Case documents			
Approved method / prior work			
External/public material, if used			
Other: _____			

Decisions that remain human

Gate	Named decision owner	Record that proves the decision
Accept source rights and completeness		
Approve interpretation and conclusion		
Sign off issue version / accept return		

Stop rule

Who may pause work if a source is restricted, contradictory or from the wrong client/case?

PARTNER-READY PROJECT MAP

4. Find the actual constraint

Count repeat handling, duplicate entry, review correction and missing inputs across a defined sample. This page identifies questions to test. It does not convert released hours into cash or promise more work.

Tally for the same sample period: _____ | cases examined: _____

Burden / role	Occurrences	Active hours	Source or estimate status
Repeated source finding			
Duplicate entry / reformatting			
Review corrections			
Missing input follow-up			
Work waiting on scarce reviewer		waiting days: _____	

Commercial reality check

Question	Evidence to check	Owner
Is this role genuinely the binding constraint?		
Is qualified demand for more suitable work visible?		
Can other roles/systems absorb more cases?		
Would extra work be accepted and collected?		

Current best reading

The constraint appears to be _____. Strongest contrary explanation: _____.

PARTNER-READY PROJECT MAP

5. Compare proportionate routes

Use the simplest route that could meet quality, rights and operator needs. Candidate responsibilities - Intake Analyst, Evidence Librarian, Delivery Analyst, Deliverable Writer and Quality Checker - can be handled by people, existing software, rules or bounded AI assistance. A role name is not a deployed agent.

Candidate change: _____

Route	What it would change here	Quality / rights risk	Test and owner
Clarify the method or handoff			
Checklist or template			
Configure existing system			
Deterministic rule			
Bounded retrieval or draft support			
Keep human-led / defer			

Failure route

If evidence is missing, a citation is wrong, a calculation uses the wrong period, or the partner returns the draft: stop at _____; reopen _____; record the receiving result at _____.

PARTNER-READY PROJECT MAP

6. Make the next decision

Keep this worksheet decision tied to its case and sample. A broader Blueprint can examine the revenue path across the firm. A no-build conclusion can be complete. A fit call checks whether a paid, measured Firm Capacity Blueprint is useful; the Blueprint maps one important revenue path across the firm and fully designs three connected improvements after measurement.

Decision record

Item	Your entry
What must be measured next, with period and case mix?	
Evidence / case IDs needed	
Named owner and reviewer	
What would make us stop or use a simpler route?	
Is deeper assessment justified? Why or why not?	
Date to revisit	

Take this to a conversation

If this exposes a repeated constraint in a service you already sell, request a Firm Capacity Fit Call at https://www.buildnbloom.io/contact?lm=project#new-work. The free conversation is triage, not custom design. If there is fit, the paid Firm Capacity Blueprint is quoted separately; you do not need to choose three workflows in advance.

Where this sits in the service

This map follows signed work to a reviewed decision pack (C2). It receives agreed scope from the enquiry-to-engagement handoff; any later method reuse needs its own permission check.