RJL SOLUTIONS

SAMPLE DELIVERABLE / LEAN OR PE-BACKED COMPANY

First-Workflow Business Case: Order Status

What a first investment decision is based on: the baseline, expected benefit, effort, owner and conditions for stopping.

SYNTHETIC EXAMPLE · FICTIONAL DISTRIBUTOR

Richard White
RJL Solutions · rjlsol.com

SYNTHETIC SAMPLE · NOT A CLIENT DELIVERABLE
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01 / DECISION REQUESTED

Fund eight weeks to test one workflow, with two points to stop.

SYNTHETIC EXAMPLE · INVENTED ORGANIZATION, PEOPLE AND FIGURES · NOT A CLIENT DELIVERABLE

Harbor Supply, a fictional industrial distributor, wants to cut the time service agents spend answering order-status questions.

ITEM	DETAIL
Workflow	Order-status questions: where is this order, and which promised date do we give the customer?
Scope	One service group of six agents and three order types
What the assistant does	Gathers the order, shipment and promised-date facts the agent may see, and cites the procedure. The agent answers the customer.
What it does not do	Send messages, change promised dates, issue refunds or release credit holds.
Ask	Fund Frame (3 weeks) and Prove (5 weeks). A Build decision comes at week 8.
Stop points	End of week 3 and end of week 8 (section 05)

FOR THE OPERATING PARTNER	The question is whether the benefit lasts after the builders leave, and whether the pattern can be reused in other portfolio companies. Both are tested before any Build money is spent.

02 / BASELINE

Agents spend most of each order-status contact looking things up.

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Measured over four weeks for the six agents in scope. All figures are invented for the sample.

MEASURE	TODAY
Order-status contacts per month	4,200
Average handling time	7.5 minutes, of which 5.0 is looking up order, shipment and date history across three systems
Repeat contacts within 7 days	18 percent
Wrong promised date given (sampled)	4 percent of contacts
Overtime in the service group	$24,000 a year
Loaded cost per agent hour	$38

The baseline also showed that inconsistent shipment updates cause much of the delay. Frame will confirm whether a data fix is needed before any AI work.

03 / EXPECTED BENEFIT

About 1,060 hours a year of capacity; cash only where overtime falls.

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Capacity and cash are shown separately. Time saved becomes cash only when spending actually changes.

STEP	ASSUMPTION	RESULT
Eligible contacts	70 percent of 4,200 a month	2,940
Used by agents	60 percent adoption	1,764 a month
Net time saved	3.0 minutes each, after checking the draft	88 hours a month
Capacity value	1,058 hours a year at $38	$40,200 a year
Cash	Half of today’s overtime no longer needed	$12,000 a year
Running cost	Model use, platform and upkeep	$14,400 a year

On cash alone the workflow costs about $2,400 more a year than it saves. The case rests on capacity and on fewer repeat contacts and wrong dates, which the COO has to value. That is stated openly so the decision is made on the right basis.

QUALITY TARGETS — Repeat contacts from 18 to 14 percent. Wrong promised dates from 4 to under 2 percent. No agent ever sees another customer’s order.

04 / EFFORT AND OWNERS

Eight weeks, a small named team and protected time.

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Part-time roles are still work, so the hours are budgeted.

ROLE	WHO	TIME
Workflow owner	Chief operating officer	2 hours a week; decides at weeks 3 and 8
Service lead	Service team manager	4 hours a week; definitions and grading answers
Engineer	In-house platform engineer	Half time
Reviewer	Finance controller (credit holds)	2 hours at weeks 3 and 8
Agents	Six agents in the service group	30 minutes a week for testing and feedback

What gets built

- Five written definitions: customer (bill-to or ship-to), order, shipment, promised date and credit hold.
- A narrow read-only order lookup that checks the agent’s permitted accounts first.
- A procedure collection limited to approved documents for this workflow.
- A short release pack with consequential tests, including another customer’s order and a source that is down.

05 / CONDITIONS FOR STOPPING

Two stop points, agreed before any results are seen.

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Stopping early is a good result if the evidence says the workflow is not worth it.

WHEN	STOP IF	OTHERWISE
End of week 3 (Frame)	Lookup time is under 3 minutes per contact, or the order system has no supported read interface	Proceed to Prove
During Prove	Any test shows an agent another customer's order	Fix and retest before continuing
End of week 8 (Prove)	Net saving under 1.5 minutes, or repeat contacts do not fall, or running cost exceeds $20,000 a year	Decide Build scope and budget

Decision record

DECISION	DATE	OWNER	REASON
Proceed / reshape / stop		Chief operating officer	

ABOUT

Richard White

I was global firm chief data officer at McKinsey & Company, owning data, AI and platforms end to end, and before that chief data officer at New York Life, where I built the chief data office and reported data risk to risk committees at multiple levels. Earlier I led data at the Federal Reserve Bank of New York and enterprise data governance at Citigroup. I founded RJL Solutions in 2024. My book, *The Day After the Demo*, is free at rjlsol.com/book.

RJL Solutions connects strategy, architecture, engineering, governance and operation through Frame, Prove, Build, and Run & Transfer. Each phase is separately scoped and priced in a written proposal before you commit. The first sixty-minute working session is free.

SAMPLE **Release Decision Brief**
The companion sample for a bank or insurer.

PAPER **AI Token Economics**
The method for forecasting running cost and benefit.

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WEB rjlsol.com

EMAIL rwhite@rjlsol.com

This sample describes no client engagement and no client result. The organization, people, systems and figures are invented to show the structure of the document. A real brief is built from the client's own baseline, tests and decisions.