

Inside an operations review

See how a workflow finding becomes a practical recommendation, an accountable owner, and a test of whether the change worked.

Illustrative example. This fictional service-request workflow demonstrates the format of an assessment. It is not a client case study or evidence of achieved results.

The situation

In this example, internal service requests arrive by email and are copied into a work queue. Missing details require follow-up, while staff cannot easily tell who owns the next step. The proposed review focuses on this one workflow, from receipt through closure.

- Business question: where could we reduce repeat handling without weakening review?
- Inputs: interviews, blank request forms, process documentation, and a walkthrough using invented requests.
- Boundary: internal service coordination. No clinical decision-making or patient data is involved.

Example finding: ownership is lost at the handoff

The fictional walkthrough identifies a point where a request can be forwarded without a named owner or acknowledgment. The recommendation is to establish a single queue, required intake fields, and an explicit acceptance step before introducing automation.

- Evidence to collect in a real review: a workflow walkthrough and an agreed sample of permitted records.
- Consequence to assess: repeated handling, unresolved requests, and uncertain escalation.
- Decision required: who owns the queue, who accepts assignments, and who resolves exceptions?

A proposed agentic workflow

After the intake process is defined, an agent could extract the request category and prepare a suggested assignment. A designated person would review uncertain requests and approve actions outside the agreed automation boundary.

- Human control: approve the routing policy and the actions the agent may take.
- Exception path: send incomplete, ambiguous, or out-of-scope requests to a named reviewer.
- Record: retain the input reference, proposed action, decision, and resulting task status.

How to decide whether to pilot

Start with a limited queue and compare the proposed process with the current one using the same definitions. Agree on acceptance criteria before implementation.

- Measure baseline handling time, repeat contacts, and time waiting for an owner.
- During the pilot, record incorrect assignments, reviewer effort, and exception volume.
- Count total work, including review and rework. Separate released staff capacity from cash savings.
- Expand only after the responsible owner accepts the results and the support arrangements.

What the roadmap would record

Each recommendation needs an owner, dependencies, an estimated implementation cost, and an acceptance test. The review should make clear which changes your own team can implement and which need a separate engagement.

- First: agree on intake fields, responsibility, and escalation.
- Next: establish a baseline and prepare permitted evaluation examples.
- Then: quote a bounded pilot with monitoring, rollback, and handover responsibilities.

Apply this to your organization

Explore [Operations Modernization Review](#) or [contact Social Enterprise Advisors](#) to discuss your priorities.