Worked Example: Cross-Functional Intake

Use the tools to improve a handoff across sales and delivery.

For: Operations leads, cross-functional teams, and sponsors | Use when: When a shared workflow has unclear ownership | Suggested time: 12 minutes

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All organizations, workflows, numbers, and results in these examples are fictional and provided for learning. Targets are proposed decision criteria, not validated standards or promised outcomes.

The situation

A fictional services company handles 80 new-project intake requests per month. Sales submits notes, delivery asks for missing scope, and operations routes the request. The team wants fewer clarification loops.

Completed opportunity canvas

Trigger: a signed project moves into delivery intake. Current steps: collect sales notes > check required fields > clarify gaps > route > delivery accepts. Friction: incomplete inputs and no shared definition of ready. Simplify first: standardize required fields and name an intake owner.

Completed Five Decisions

Use AI to support the handoff after the process is clarified.

Problem

Reduce clarification loops and make delivery acceptance visible.

Product

Draft a structured intake brief, highlight missing fields, and propose a routing category. No contract interpretation or automatic commitments.

People

Sales confirms source notes; operations lead owns intake; delivery lead accepts work; platform team supports tooling.

Production

Approved synthetic notes first. Mark missing information as unknown. Do not invent dates, budgets, scope, or customer commitments.

Proof

Compare complete-on-first-review rate, clarification loops, and total active time. Test missing and contradictory notes before real use.

Completed prioritization and route decision

Value 2: recurring friction, baseline not measured. Feasibility 2: structured drafting is scoped but untested. Source readiness 2: notes need standardization. Capacity 2: owner has limited time. Control readiness 2: human approval exists but must be tested. With equal weights the illustrative total is 10 of 15; that total grants no approval. Decision: standardize intake, then investigate a draft-only pilot. Route: Rent if an approved platform meets requirements; otherwise compare a bounded DIY prototype.

Completed evaluation cases

Ordinary: all required fields present > preserve facts and draft brief. Incomplete: budget missing > label unknown, request clarification. Contradictory: two delivery dates > surface conflict, do not choose. Out of scope: request to promise new scope > withhold commitment and route to delivery lead. Failure: source unavailable > keep the original manual intake path.

Completed proof plan

Planning assumptions: 80 requests/month at 20 active minutes each; proposed target 14 minutes, including review. Capacity if achieved: 80 x (20 - 14) / 60 = 8 hours/month. No cash savings established. Track clarification loops and complete-on-first-review rate separately. Review after an authorized two-week pilot; stop if drafts invent commitments.

Completed handoff and next decision

Operations lead owns the shared definition of ready and weekly exceptions. Sales owns note accuracy; delivery owns acceptance. Days 1-30: define baseline and test with synthetic cases. Days 31-60: conditional limited pilot. Days 61-90: decide whether a maintained product is warranted. The first useful intervention may be the standardized form itself.

Original guide: https://builtinto.work/resources/worked-example-cross-functional