

EDITABLE AND PRINTABLE FIELD BOOK

Delivery toolkit

Eighteen reusable consulting materials plus two completed synthetic examples.

Fictional demonstrations use synthetic data and perform no external actions. Commercial ranges are examples, not commitments.

Delivery toolkit templates

Version: 1.0

Use with ordinary business information only. The templates are operating materials, not legal, privacy, cybersecurity, accounting, or industry advice. Items marked LEGAL REVIEW require qualified review before real use.

01 - Qualification brief

- Business and decision owner:
- Visible problem:
- Affected customers or staff:
- Current system of record:
- Data involved:
- Customer-facing authority requested:
- Reversibility and fallback:
- Urgency and decision date:
- Example budget range:
- Fit: yes / conditional / no
- Stop condition:
- Evidence needed before discovery:

02 - Discovery guide

Outcome

- What should be easier, faster, safer, or more visible?
- How is success measured now?
- What must not change?

Current process

- Trigger:
- Steps and owners:
- Systems and channels:
- Exceptions:

- Failure and rework:
- Baseline evidence:

Authority and data

- Allowed inputs:
- Prohibited inputs:
- Customer-facing actions:
- Required human approvals:
- Retention and deletion:
- Account and vendor owner:

Decision

- Smallest useful pilot:
- Approver:
- Decision date:
- Unresolved questions:

03 - Process map

Step	Trigger/input	Owner	System	Action	Handoff	Friction	Evidence	Failure	Fallback
1									

End state:

Unowned state:

Reconciliation method:

04 - AI opportunity assessment

Score each input 1-5.

Opportunity	Value	Effort	Risk	Readiness	Evidence confidence	Authority	Disposition

recommend / pilot / reject

Recommended first step:

Rejected alternative and reason:

Human decision retained:

05 - Risk classification

Dimension	Low	Medium	High	Selected	Control	
--- ---	--- ---	--- ---	--- ---	--- ---		
Data sensitivity	Public	Ordinary business	Regulated/sensitive			
Customer impact	Internal aid	Reviewable draft	Commitment/action			
Autonomy	Suggest	Prepare	Execute			
Reversibility	Immediate	Recoverable	Hard to reverse			
Monitoring	Direct	Sampled	Weak/unknown			

Overall class:

Required approvals:

LEGAL REVIEW:

Stop/rollback trigger:

06 - Vendor comparison

Observation date:

Requirement	Weight	Vendor A	Vendor B	Vendor C	Evidence/source	
--- ---	--- ---	--- ---	--- ---	--- ---		
Core workflow fit						
Pricing basis						
User/admin controls						
Integrations						
Data and retention						
Export and deletion						
Support and status						
Switching risk						

Scripted trial:

Decision and conditions:

07 - Build-versus-buy analysis

Factor	Buy/configure	Build	Evidence	
--- ---	--- ---	--- ---	--- ---	
Workflow maturity				
Differentiation				
Time to safe use				
Total first-year cost				
Maintenance owner				
Permissions/audit				
Export/exit				
Failure recovery				

Recommendation:

What remains custom:

Exit trigger:

08 - ROI estimate

Baseline period:

Input	Low	Base	High	Evidence	Confidence
Monthly volume					
Minutes saved/item					
Loaded labor rate					
Recovered value					
Monthly total cost					

Formula:

Sensitivity:

Excluded value:

Attribution limit:

Decision threshold:

09 - Scope brief

- Desired outcome:
- In scope:
- Deliverables:
- Out of scope:
- Assumptions:
- Client responsibilities:
- Consultant responsibilities:
- Dependencies:
- Timeline:
- Review rounds:
- Acceptance criteria:
- Post-acceptance period:
- Change-control rule:
- LEGAL REVIEW:

10 - Proposal

Problem and evidence

Recommended engagement

Work plan

Deliverables

Example investment and pricing assumptions

Risks, exclusions, and client responsibilities

Acceptance and handoff

Next decision

LEGAL REVIEW: commercial and contract language.

11 - Statement of work

- Parties: LEGAL REVIEW
- Effective date: LEGAL REVIEW
- Scope and deliverables:
- Milestones:
- Client dependencies:
- Access and account ownership:
- Data restrictions:
- Customer-facing authority:
- Testing and acceptance:
- Change control: LEGAL REVIEW
- Fees and payment: LEGAL REVIEW
- Intellectual property: LEGAL REVIEW
- Warranty and support: LEGAL REVIEW
- Privacy, security, and retention: LEGAL REVIEW
- Liability and indemnity: LEGAL REVIEW
- Termination and transition: LEGAL REVIEW

- Signatures: LEGAL REVIEW

12 - Implementation plan

Phase	Owner	Work	Dependency	Evidence	Exit gate
Baseline					
Configure					
Pilot					
Launch					
Handoff					

Access plan:

Migration plan:

Fallback:

Rollback:

Communications:

13 - Acceptance test

ID	Area	Scenario	Expected result	Evidence	Status	Owner
AT-01	Functional	Normal flow				
AT-02	Safety	Ambiguous input				
AT-03	Safety	Sensitive input				
AT-04	Failure	Integration outage				
AT-05	Failure	Duplicate retry				
AT-06	Data	Export/deletion				
AT-07	Access	Unauthorized user				
AT-08	Experience	Mobile/keyboard/zoom				
AT-09	Recovery	Disable and fallback				

Acceptance authority:

Open issues:

14 - Training plan

- Audience and roles:
- Primary operator:
- Backup operator:
- Learning objectives:
- Demonstration:
- Guided practice:

- Required scenarios:
- Proficiency check:
- Materials:
- Escalation path:
- Refresher schedule:
- Training evidence:

15 - Operating procedure

1. Trigger and intake:
2. Verify the original record:
3. Check the suggested result:
4. Confirm authority and prohibited commitments:
5. Assign owner and next action:
6. Escalate exception, risk, or sensitive data:
7. Record the disposition:
8. Close and reconcile:
9. Use manual fallback when:
10. Report a defect when:

16 - Handoff record

- Accepted deliverables:
- Production accounts and owner:
- Admin and operator roles:
- Credentials transferred through approved channel:
- Data export location:
- Documentation index:
- Known issues:
- Deferred ideas:
- Monitoring owner:
- Maintenance owner:
- Vendor renewal owner:
- Disable and rollback evidence:
- Support period:
- Client acceptance:

- LEGAL REVIEW:

17 - Maintenance plan

Frequency	Check	Owner	Evidence	Escalation
Weekly	Failures, low confidence, unresolved work			
Monthly	Knowledge, permissions, cost, vendor changes			
Quarterly	Export, deletion, disable, fallback, training			
Incident	Narrow authority, correct, retest, approve			
Renewal	Value, total cost, alternatives, exit			

18 - 30-day review

- Review period:
- Adoption and operator use:
- Baseline versus current:
- Quality and completeness:
- Response or cycle time:
- Errors and exceptions:
- Customer or staff feedback:
- Value evidence:
- Full cost:
- Permission and data review:
- Vendor change:
- Keep / narrow / expand / remove:
- Next actions, owner, and date:
- LEGAL REVIEW for any scope or term change:

Completed synthetic example - Marigold Studio

All names, records, volumes, costs, and outcomes are fictional. No appointment, message, payment, or external action occurred.

Qualification

- Decision owner: fictional studio owner
- Problem: staff manually coordinates appointment type, availability, late changes, and repetitive questions
- Data: ordinary contact and scheduling information only
- Requested authority: suggestion and draft preparation; no real confirmation
- Fit: conditional, with a real scheduling system of record and staff review
- Stop condition: uncertain calendar state, sensitive note, exception, or consent failure

Current process

Requests arrive by phone, generic form, and social message. Staff interprets the goal, selects a service, checks personal calendars, asks for missing details, confirms, and sends reminders. There is no shared exception or reschedule view.

Opportunity assessment

Opportunity	Priority	Disposition
Structured self-booking	87	Recommend
Reschedule guardrails	80	Recommend
No-show reminder plan	80	Pilot with consent
Approved-source FAQ	73	Pilot
Service recommendation	63	Suggestion only
Autonomous exception approval	30	Reject

Risk classification

Overall class: medium when all real confirmations remain in the scheduling vendor and staff owns exceptions. High if the system can confirm uncertain availability, process sensitive notes, or send reminders without consent.

LEGAL REVIEW: cancellation terms, deposits, reminder consent, accessibility, privacy, retention, and customer notice.

Vendor trial

Acuity and Square Appointments should receive the same scripted trial:

1. Configure the three synthetic services, duration, buffer, staff, and hours.
2. Book, reschedule, cancel, waitlist, and block an exception.
3. Check roles, history, export, reminder consent, failure, and disable.
4. Compare full subscription plus processing and migration cost.

Decision: no purchase in the synthetic case. Acuity is the focused scheduling benchmark; Square is the consolidated benchmark if payments are already in Square.

ROI example

- 88 requests/month
- 7 minutes saved/request
- \$24 loaded hourly cost
- 2 retained sessions/month
- \$105 contribution/session
- \$145 monthly software/support cost

Illustrative labor value: \$246

Illustrative retained contribution: \$210

Illustrative net monthly value: \$311

This is an assumption model, not a result or guarantee.

Acceptance tests

- Normal color, wardrobe, and workshop flows
- Ambiguous recommendation routes to staff
- Group above six routes to staff

- Sensitive or guarantee language routes to staff
- Reschedule changes only browser state
- No email, SMS, calendar, payment, analytics, or network write
- Keyboard, mobile, tablet, desktop, reduced motion, zoom, and visible focus
- Export, disable, fallback, and operator proficiency before real use

30-day decision

Synthetic outcome: continue only if the real pilot shows complete records, lower coordination time, no unauthorized confirmations, reliable rescheduling, and staff adoption. Otherwise narrow or remove the automation.

Completed synthetic example - Canopy & Pine

Canopy & Pine Home Services is fictional. Its staff, customers, jobs, prices, volume, costs, and outcomes are synthetic. No inquiry, estimate, dispatch, follow-up, message, or external action occurred.

Qualification

- Decision owner: fictional owner-operator
- Problem: inquiries arrive across channels and are manually qualified, prioritized, estimated, dispatched, and followed up
- Data: ordinary service request and property-access scheduling information
- Requested authority: classification, estimate preparation, queue, and draft follow-up; no send, quote, schedule, or dispatch authority
- Fit: conditional, with a mature field-service system of record
- Stop condition: safety term, sensitive information, uncertain scope, price or availability commitment, or failed integration

Target process

1. Structured inquiry
2. Service-area and minimum-information qualification
3. Priority suggestion with visible reasons
4. Estimate line-item assistance from an approved price book
5. Human-approved job and dispatch status
6. Draft follow-up with no automatic send
7. Audit, reconciliation, and manual fallback

Build-versus-buy

Buy or configure CRM, customer records, scheduling, quotes, jobs, invoices, payments, and core dispatch. Build only the bounded intake, classification, approved-knowledge retrieval, estimate-preparation, and demonstration layer.

Jobber and Housecall Pro should receive the same scripted trial. No vendor purchase occurs in the synthetic example.

Risk classification

High-risk states include unsafe property conditions, emergency language, autonomous pricing, crew assignment without capacity review, customer promises, payments, access credentials, and sensitive data. These always stop for a person.

LEGAL REVIEW: estimate and contract terms, marketing consent, location and worker data, privacy, retention, accessibility, and customer notice.

Acceptance tests

- Complete and incomplete inquiries
- Out-of-area and ambiguous service
- Safety, emergency, and sensitive terms
- Estimate line item with approved-source citation
- Price override requires human approval
- Dispatch drag or status change remains browser-only
- Follow-up remains visibly DRAFT - NOT SENT
- Duplicate retry, outage, export, disable, rollback, and manual queue
- Mobile, tablet, desktop, keyboard, reduced motion, and visible focus

30-day decision

Keep only the controls that improve completeness, review time, ownership, and status visibility without unauthorized price, schedule, dispatch, or customer communication. Narrow or remove any automation with weak evidence or poor operator trust.