



Request to invoice

A current-state and ownership map

A fictional small field-service business. Every role, tool and step is invented for this example; the ownership questions are deliberately unresolved.

SCOPE Accepted request to invoice prepared

RESPONSIBILITIES IN THIS SCENARIO

OPEN OWNERSHIP QUESTIONS

01 Request recorded

Office coordinator Shared inbox + job sheet

Records the accepted request in the job sheet.



Request details handed over

02 Visit scheduled

Scheduler Shared calendar

Assigns a visit and sends the technician the details.



Visit assignment sent

03 Work completed

Technician Job note + email

Records the work done and emails a completion note.



Completion note emailed

04 Invoice prepared

Bookkeeper Accounting app

Uses the completion note to prepare the invoice.

Q1 / OWNER OPEN

Who checks missing job details before a visit is scheduled?

Q2 / OWNER OPEN

Who updates the job sheet when the visit date changes?

Q3 / OWNER OPEN

Who follows up when a completion note has not arrived?

A Systems Review can clarify these boundaries

Trace sample cases with the people doing the work. Record the evidence, agreed owners and open items before choosing a change.