

Intake to Delivery Starter Map

Use the method

Make one customer request visible from arrival to accepted delivery. Use this when work gets lost between conversations, inboxes, and the people doing the job. The finished map names each handoff, the information required, and the evidence that work is complete. Start with one service rather than mapping the entire business.

- 1. Choose the service.** Write the trigger that starts the process and the customer result that ends it. Use a recent ordinary job as your reference.
- 2. List the stages.** Write intake, qualification, scope confirmation, scheduling, delivery, acceptance, and closeout. Rename stages to match how you actually work.
- 3. Name each handoff.** For every stage, identify who acts, what information they need, and who receives the result. In a solo business, the owner can hold several roles.
- 4. Set entry and exit rules.** Define the minimum information needed to start a stage and the visible record required to leave it. An email approval or completed checklist can be enough.
- 5. Add exceptions.** Decide what happens when information is missing, capacity is unavailable, or scope changes. Assign a person to resolve the exception before work continues.
- 6. Walk one job through.** Trace a recent request across the map. Repair missing handoffs, then use the map on the next job.

Worked example

Illustrative service: a small business requests a document cleanup. Intake begins when the request arrives; delivery ends when the customer confirms the agreed files are usable.

Intake: owner records contact, document type, desired result, and requested date. Qualification: owner checks fit and capacity. Scope: customer confirms five files, one revision round, and exclusions in writing.

Schedule: owner assigns a delivery date after confirmation. Delivery: editor creates the files and checks them against the scope. Acceptance: customer confirms receipt and either accepts or identifies an agreed correction. Closeout: owner stores final files and records follow-up.

Exception: a sixth file arrives during editing. The owner records the request and obtains a scope and schedule decision before adding it. A vague verbal request does not silently change the map.

Before you put it to work

- [] Every stage has an owner and a clear next handoff.
- [] Work starts only after the required scope and scheduling decisions.
- [] Customer acceptance is supported by a record.
- [] An exception has a named decision owner.

If the problem keeps returning

If the same handoff keeps failing, observe one real job at that point. Replace a vague instruction such as "send to operations" with a named role, a record location, and a minimum information list.

Connect the tools

Use BO-01 for offer clarity, BO-03 for a recurring task, and BO-07 for scope decisions.

First use

Use the worksheet on the next page for one real task. Complete the decision fields, name the person responsible, and choose a review date. Duplicate the worksheet when you need another record.

Working worksheet

Name or team _____ Date _____

Service and boundaries

Service, customer result, start trigger, final acceptance evidence, and record location.

Stage and handoff map

Stage	Owner	Required input	Exit evidence	Next recipient	Exception route

Duplicate rows or this worksheet for additional records.

Complete and review

Exception handling

Missing input, scope change, unavailable capacity, decision owner, and permitted next step.

Acceptance and closeout

Customer reviewer, acceptance record, final files, and follow-up owner.

Review after use

Where did a request stall or arrive incomplete? _____

What handoff rule needs to change? _____

Who will change it and by what date? _____

Which next job will test the revised map? _____

Next action _____ Owner _____ Due _____