01 / THE DECISION

Standardize the work, not the guess.

One discovery source describes inconsistent delivery practices. The evidence supports a verification plan - not a proven cause or a software purchase.

DE-IDENTIFIED TEST FIXTURE | CONTROLLED SOFTWARE EVIDENCE

WHAT THE STAKEHOLDER REPORTED

A consulting firm wanted more consistent delivery from sales through completion. The managing partner described referrals not always entered promptly, work beginning before project setup, inconsistent project-update channels, and late time entries affecting invoices.

Source: one de-identified discovery transcript. No operating records or occurrence frequencies were inspected.

WHAT THE EVIDENCE PERMITS

The statements identify specific handoffs worth checking. They do not establish the root cause, scale, relative priority, a system defect, or financial impact.

FIRST DIRECTION / VERIFY BEFORE REDESIGN

Confirm project-ready conditions and exception authority. Establish which progress record counts. Trace time-entry approval through invoicing. Then decide what to standardize or automate - with the accountable owner.

02 / SOURCE-DERIVED PROCESS

Thirteen stages. Incomplete operating facts.

The VDCC ledger reconstructs named stages from a de-identified discovery fixture. The groups below aid reading; they do not establish the exact order followed in live engagements.

01 / ENTER + AGREE

Lead Source - Discovery - Proposal - Revisions - Agreement

Some referrals were not entered in HubSpot immediately; proposal authors varied.

02 / INITIATE

Kickoff - Project Setup - Assignment

A project manager typically creates Asana work; urgent starts may precede setup.

03 / DELIVER + UPDATE

Delivery - Progress Tracking - Client Updates

Asana was intended for status; some updates also came through Slack or email.

04 / TIME + BILL

Time Entry - Billing

Late entries were reported to delay some invoices for hourly projects.

RETAINED LEDGER OUTPUT / PROJECT SETUP

State: reported | **Evidence class:** client_reported_evidence | **Confidence:** moderate

Owner: Project Manager (reported) | **System:** Asana + Shared folders (reported)

Source excerpt: "The project manager creates the project in Asana and sets up shared folders."

Source: D01 / T01. Actual selected fields; formatted for reading. Internal IDs excluded.

03 / FOUR VERIFICATION TARGETS

A reported issue is not an observed failure.

The stakeholder statements identify where to inspect actual records. Each question below is a proposed next diagnostic action, not a concluded root cause.

01 LEAD RECORDING — REPORTED

Some referrals do not reach HubSpot promptly.

Check: What percentage of recent accepted inquiries was recorded, and when?

02 PROJECT READINESS — REPORTED

Work occasionally starts before setup and folders are complete.

Check: What was signed, approved and ready at the time work began?

03 STATUS VISIBILITY — REPORTED

Some progress updates appear in Slack/email rather than Asana.

Check: Which status record is authoritative, and were variations approved?

04 BILLING TRANSFER — REPORTED

Late time entries reportedly delay some hourly invoices.

Check: Do dated time-entry and invoice events confirm that dependency?

The sequence above is proposed judgment, not a measured risk ranking. Business priority still requires evidence of frequency, consequence and decision authority.

04 / HUMAN DECISION GATES

The responsible person approves the change.

This is a proposed diagnostic sequence. It does not represent a completed client approval or an end-to-end OCA report delivery.

01

RECONSTRUCT WITH RECORDS

Inspect dated, permission-cleared referral, agreement, kickoff, setup and first-work examples.

Gate: Evidence coverage and exceptions recorded

02

DEFINE PROJECT-READY

Set minimum setup conditions and who may approve exceptions.

Gate: Business owner accepts or revises rule

03

SET STATUS EXPECTATIONS

Define one dependable progress record without erasing legitimate client variation.

Gate: Owners confirm status and exception criteria

04

VERIFY THE BILLING TRANSFER

Check time-entry cutoffs, approvals and invoice events with Accounting.

Gate: Time-to-invoice handoff verified

05

THEN REVIEW TECHNOLOGY

Consider integration only for a repeatable, evidenced problem with accountable ownership.

Gate: Explicit human authorization and baseline

Method boundary: Findings can remain on hold. Recommendations do not substitute for accountable human approval.

05 / TEST EVIDENCE + LIMITS

What the software tests actually showed.

The checks below describe controlled behavior. They do not independently confirm the stakeholder account or prove an improved live operation.

12 / 12

PROCESS LEDGER

T01, fresh suite rerun

24 / 24

RELEASE LOCK

T02, fresh suite rerun

SELECTED TEST CASES / EXPECTED - OBSERVED

TEST	EXPECTED	OBSERVED IN SUITE
T01 / STAGES	13 source-derived stages	13-stage fixture passed
T01 / SOURCE	Stakeholder claims stay Reported	Provenance and source refs passed
T01 / REVISION	Revised facts retain lineage	Supersession assertion passed
T01 / CONTRADICTION	Contradiction lowers confidence	Original fact retained; test passed
T02 / RELEASE	Version and source hashes match	v3.15 lock checks passed

LIMITED BROWSER CHECK

B01 / Synthetic Chrome: The unchanged VDCC UI code was injected into an isolated browser page. A synthetic client and two imported sources remained visible after view switching. This is **not** an installed-extension or end-to-end audit acceptance test.

SOURCE INDEX + RELEASE BOUNDARY

D01-D02 de-identified fixtures; **T01** process-ledger tests; **T02** release-lock tests; **R01** archived report (457/457 targeted checks, not rerun in full). Source archives remain private, not independently reproducible from this brief.

Not established: delivered client audit, human approval, installed-extension E2E, business results or ROI.

CASE STUDY / raelferrer.com/work/operational-clarity-audit/