

PRODUCT WORKFLOW STUDY

From an unexpected on-site finding to documented scope change and customer approval

An approval workflow showing how Corexa can connect additional technical findings, price impact, customer decision and the final service record.

Evidence level stated clearly throughout

Repository-reviewed

Capability basis

Scope approval

Primary workflow

Connected record

Operating model

Pilot required

Outcome standard



THE CHALLENGE

Why the existing process breaks down

A technician often discovers work that was not visible when the job was booked. Continuing without approval creates commercial risk; stopping without a clear process creates downtime and another visit. The decision needs technical evidence and a reliable customer response.

01

The original scope is unclear

The customer and technician may have different assumptions about what was authorised.

02

Additional work is verbal

Approval is obtained by phone but not attached to the job or final invoice.

03

Price impact is incomplete

Labour, parts, call-out and return-visit consequences are not shown together.

04

The approver is wrong

A site employee may not have authority to approve the additional spend.

05

Technician time is lost

The technician waits while the office reconstructs the finding and contacts the customer.

06

Declined work disappears

A rejected recommendation is not preserved for future maintenance or risk review.

The central risk

Uncontrolled scope change can create disputes even when the technical work was necessary and performed correctly.

THE OPERATING MODEL

A connected workflow around the machine

Corexa can turn the technician finding into a documented recommendation or quote, route it to the correct approver and preserve the decision against the machine and job.

1

Document finding

Record evidence, urgency and consequence of no action.

2

Define additional scope

Add parts, labour, timing and any return requirement.

3

Route approval

Send to the authorised contact with a clear decision path.

4

Act on decision

Continue, defer, quote separately or make the machine safe.

5

Preserve outcome

Record approval, rejection and final work completed.

COREXA CAPABILITY	OPERATIONAL CHANGE	WHY IT MATTERS
Original job scope	Retains the work requested and initially authorised.	Additional work can be compared with the starting agreement.
Technician recommendations	Records finding, evidence and consequence.	The customer decision is grounded in technical context.
Quote and approval flow	Presents price and scope to the responsible contact.	Approval becomes a visible system event.
Customer contact roles	Distinguishes site contacts from commercial approvers.	Requests can reach the person with authority.
Deferred recommendation history	Keeps rejected or postponed work with the machine.	Future technicians can see known unresolved risk.
Invoice alignment	Uses approved scope and recorded work in commercial review.	The invoice is easier to reconcile with the decision.

CREDIBILITY STANDARD

What is supported - and what is not yet claimed

A credible case study distinguishes repository evidence, real workflow scope and future outcome hypotheses. The evidence level below is deliberately explicit.

✓ Repository capability

The repository contains job scope, technician recommendations, quotes, approvals, customer contacts, deferred maintenance and invoice workflows.

✓ Connected operating model

The workflow is designed to keep scope approval connected to the relevant machine, customer, site, job and responsible user.

✓ Credible limitation

Digital approval wording and enforceability should be reviewed for the business's terms, authority rules and jurisdiction.

✓ Pilot requirement

A defined cohort should be measured from baseline through controlled use before any productivity, cost, revenue or satisfaction outcome is published.

Not yet claimed: this case study does not present a measured productivity, revenue, accuracy or customer-satisfaction improvement. A controlled baseline and participant-approved result are required before those claims are published.

Measurement plan for the publishable version

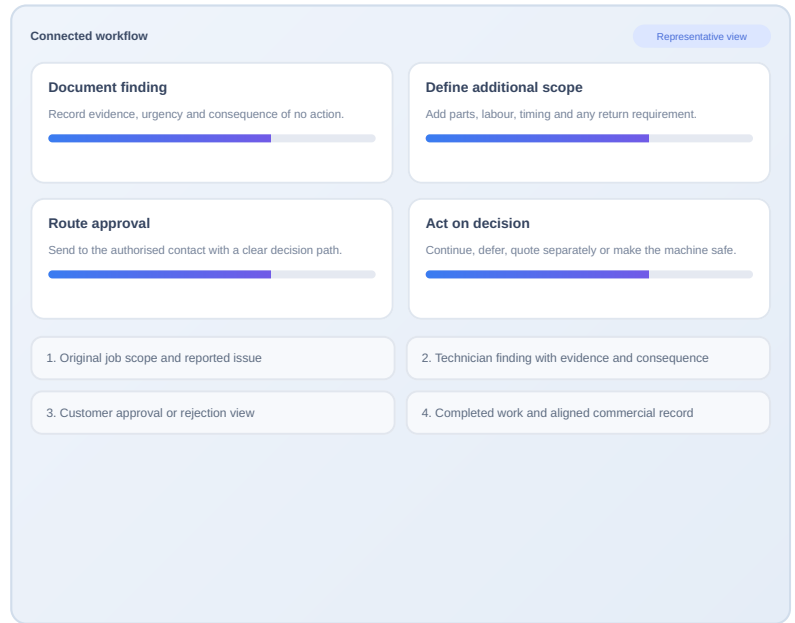
MEASURE	EVIDENCE SOURCE	CREDIBLE REPORTING
Approval response time	Quote/approval timestamps	Median time from finding to decision.
Authorised-contact rate	Contact role audit	Percentage routed to an approved decision-maker.
Unrecorded verbal approval	Job review	Additional work lacking a linked approval event.
Scope-to-invoice match	Quote, completion and invoice comparison	Percentage where approved scope matches billed work or has documented variation.
Deferred-work visibility	Machine recommendation audit	Rejected or postponed findings retained with status.
Return-visit consequence	Linked job analysis	Additional visits attributable to delayed approval.

"A scope change is credible when the technical reason, commercial impact and customer decision remain connected."

MAKE THE STORY TANGIBLE

Show one unexpected finding becoming an approved or deferred action

Present the original scope, technician evidence, additional quote, authorised decision and final job/invoice result. Include a declined path where the recommendation remains visible.



Recommended evidence-building sequence

Phase 1 - Baseline

Select a representative sample and record the current process, delays, errors and missing evidence.

Phase 2 - Controlled workflow

Apply one agreed Corexa process, ownership rule and completion standard for 8-12 weeks.

Phase 3 - Verified result

Report system-derived measures, dated screenshots and a participant-approved quotation.

Build the publishable proof layer

Replace representative views with dated interface screenshots, a defined baseline, system-derived measures and an approved participant quotation.

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Publication note: capability descriptions are based on the Corexa repository supplied in July 2026. Confirm the deployed workflow, permissions, integrations and data quality before presenting a capability as a completed customer outcome.