

PRODUCT WORKFLOW STUDY

From a new account to the first connected machine, job and visible outcome

An activation workflow showing how guided onboarding can help each Corexa audience reach useful operating value before configuration becomes overwhelming.

Evidence level stated clearly throughout

Repository-reviewed

Capability basis

Guided activation

Primary workflow

Connected record

Operating model

Pilot required

Outcome standard



THE CHALLENGE

Why the existing process breaks down

A broad platform can demonstrate substantial capability while still losing new users during the first session. Service businesses, technicians, cafés, home owners and corporate fleets each need a different starting path and a small, credible first success.

01

The product opens too broadly

New users see many modules before understanding the one workflow that solves their immediate problem.

02

Setup is not role-specific

A home owner and service administrator are asked for similar information despite different goals.

03

Data requirements feel heavy

Users are asked to complete a full operating model before seeing value.

04

Demo content and live data blur

Users may not know whether a dashboard reflects their account or representative examples.

05

Progress is not visible

The user cannot see which setup steps are complete or what unlocks next.

06

Human onboarding is disconnected

Guided demonstrations and assisted configuration are not recorded as part of activation.

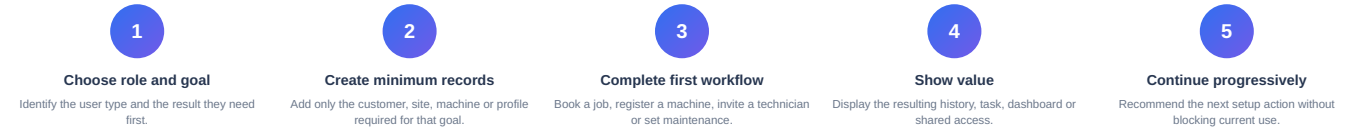
The central risk

A capable platform can appear difficult when the first session exposes the whole system instead of guiding the user to one meaningful result.

THE OPERATING MODEL

A connected workflow around the machine

Corexa can identify the user role and goal, recommend a short setup path, create the first connected records and surface a clear outcome such as a service-ready machine or scheduled job.



COREXA CAPABILITY	OPERATIONAL CHANGE	WHY IT MATTERS
Role-aware entry	Routes users to home, technician, business or corporate context.	The first screen reflects the reason they joined.
Guided tours and help	Explains actions inside the active workflow.	Learning occurs while the user completes real setup.
Progressive data capture	Allows essential records first and enrichment later.	Users reach value before every field is complete.
Demo and empty states	Shows representative value while clearly labelling example data.	The platform feels understandable without misrepresenting live results.
Assisted onboarding	Supports guided setup of machines, customers, technicians and schedules.	Human help can accelerate complex business activation.
Next-best action	Suggests the next relevant setup step.	Activation continues without presenting the entire platform at once.

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 role-aware dashboards, guided tours, help systems, customer/site/machine setup, invitations, onboarding-related marketing and multiple audience flows.

✓ Connected operating model

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

✓ Credible limitation

Activation improvement requires product analytics and real user observation; a polished tour alone does not prove that users understand or retain the workflow.

✓ 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
Time to first value	Signup and workflow timestamps	Median time to the defined role-specific outcome.
Activation completion	Onboarding events	Percentage reaching the minimum connected-record milestone.
Setup abandonment	Funnel analysis	Users leaving before first value, by step and role.
Assisted versus self-serve	Onboarding source	Completion and time reported separately for guided setup.
First-week return	Session activity	Activated users returning to continue a real workflow.
Support friction	Help and message events	Questions or errors concentrated at each onboarding step.

"The first Corexa experience should prove one connected workflow before asking the user to understand the whole platform."

MAKE THE STORY TANGIBLE

Show one new user reaching a real first outcome

Choose a single audience and display role selection, minimum setup, completed first workflow, resulting dashboard value and the next recommended action. Clearly label any demo content.



Connected workflow

Representative view

Choose role and goal

Identify the user type and the result they need first.

Create minimum records

Add only the customer, site, machine or profile required for that goal.

Complete first workflow

Book a job, register a machine, invite a technician or set maintenance.

Show value

Display the resulting history, task, dashboard or shared access.

1. Role and first-goal selection

2. Minimum customer, machine or profile setup

3. Completed first job, share or maintenance action

4. Dashboard result and next-best action

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.

corexa.com.au
sales@corexa.com.au

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.