

A request workflow story

A fictional demonstration of the CaseHarvest pilot

This kit shows how one source can become a case study, a one-page sales PDF, and five quote assets. Lattice Harbor, QueuePath, the operations lead, and every statement below are invented for this demonstration. There is no real customer, interview, testimonial, or performance result.

Fabricated source excerpt

Speaker: fictional operations lead at Lattice Harbor | Product: fictional QueuePath

S1 “Before QueuePath, requests arrived by email and were copied into a spreadsheet. A request could have a description but no clear owner. When someone asked for an update, we had to look through messages and ask around.”

S2 “We wanted a shared place to see the request, who owned it, and what should happen next. We chose to try QueuePath for our internal operations requests. We did not move every kind of work into it.”

S3 “We started with the active requests already in our spreadsheet. For each one, we added an owner, a next action, and any context the person taking over would need. We agreed on those fields before asking the team to use the list.”

S4 “Now I open the shared list before our review. I can see the owner and the next action together. We spend the review asking what is blocking a request, rather than reconstructing its history from separate messages.”

S5 “The useful change is that someone taking over a request can read the context in the same place. People still need to update the record. If the next action is missing, the software cannot decide it for us.”

S6 “We have not measured time savings, revenue impact, or customer satisfaction. I can describe the change in how we work, but I would not put a percentage on it. This is our experience with this internal request list, not evidence about every team.”

S7 “My advice would be to agree what a request owner is responsible for before moving the list. For us, that means keeping the next action and the context current. The shared list only stays useful if people maintain it.”

What a real pilot needs

An existing approved transcript, story, or interview notes; permission to adapt the material and use the customer’s name and quotes; supplied brand assets; and one person authorized to approve the draft. Publicly available material is not automatically cleared for reuse.

Clear ownership for internal requests

Lattice Harbor, a fictional B2B operations consultancy, wanted a clearer way to handle internal requests. Its existing process used email and a spreadsheet, but those tools did not always make responsibility visible. By trying QueuePath for a defined set of internal operations requests, the team created a shared record of the owner, the next action, and the context needed to continue the work. The change described here is qualitative: a different way to prepare for reviews and hand over requests, without a measured claim about financial or time savings.

When an update meant reconstructing the request

The original process began in email. Requests were then copied into a spreadsheet, where a description could exist without a clear owner. To answer a question about progress, the team had to search through messages and ask colleagues for context. The information needed for an update was spread across the record and the conversations around it. [S1]

That shaped the requirement for a new approach. The team wanted to see the request, the person responsible for it, and the next step in one shared place. It chose internal operations requests as the scope of the trial. Other kinds of work stayed outside the move, keeping this account focused on one workflow. That boundary matters when interpreting the story: it describes how the team handled these requests, and does not describe a company-wide change to every project, task, or customer interaction. [S2]

Making the shared record useful

Lattice Harbor began with the active requests in its existing spreadsheet. Each request received an owner and a next action, plus the context another person would need when taking over. The team agreed on these fields before asking people to work from the list. The move therefore included an agreement about what a useful request record should contain, as well as a change of software. [S3]

The owner field made responsibility visible in the shared view. The next action recorded what should happen after the current step, while the context gave a colleague something to read before continuing the work. These are the elements the source describes; it does not establish that the software automated decisions or removed the need for discussion. [S2–S5]

A different starting point for reviews

The operations lead now opens the shared list before a review and sees the owner alongside the next action. The discussion starts with what is blocking a request, instead of reconstructing its history from separate messages. That is the reported change in the review process, and the strongest outcome supported by this account. [S4]

“I can see the owner and the next action together.” [S4]

The same record supports handovers. Someone taking over can find context in the place where the request is tracked. This does not make the record self-maintaining. Team members still need to update it, and a missing next action remains a gap that the software cannot resolve on their behalf. The value described depends on people keeping the information current. [S5]

What the experience does and does not establish

The source contains no measured time saving, revenue impact, or customer satisfaction result. It also does not establish how a different team would perform. The supported story is narrower: one team changed how it records ownership, prepares for reviews, and passes context to a colleague. Any stronger claim would need additional evidence and approval before publication. [S6]

The operations lead's advice is to define the owner's responsibility before moving a request list. At Lattice Harbor, that responsibility includes keeping the next action and context up to date. For a team considering a similar workflow, the account offers a concrete starting question: what information must an owner maintain so the next person can continue the work? [S7]

FICTIONAL DEMONSTRATION · Source tags refer to page 1. This is not a customer endorsement.

A shared view of the next action

Lattice Harbor × QueuePath

Fictional B2B operations consultancy / Internal request workflow

The challenge

Requests arrived by email and were copied into a spreadsheet. A description did not always identify an owner. Answering an update question meant looking through separate messages and asking colleagues for context. [S1]

The approach

Start with the active internal operations requests. Put the owner, next action, and handover context in a shared list. Agree on these fields before asking the team to use the new workflow. [S2–S3]

The reported change

Before a review, the operations lead can see the owner and next action together. Discussion centers on what is blocking the request. A colleague taking over can read the context in the same place. [S4–S5]

“I can see the owner and the next action together.”

Fictional operations lead, Lattice Harbor [S4]

The evidence boundary

No measured time savings, revenue impact, or customer satisfaction results are available. Records still need to be maintained by people. This example supports a qualitative workflow story only. [S5–S7]

A useful question for your team

Can someone taking over a request find the owner, the next action, and the context in one place?

FICTIONAL DEMONSTRATION · All entities and source statements are fabricated. This page shows a deliverable format, not actual customer proof.

Five usable source extracts

Each quote below is an exact excerpt from the fabricated source on page 1. Suggested use is an editorial recommendation. These are demonstration assets only, not publishable endorsements.

1 Review preparation

“I can see the owner and the next action together.”

Fictional operations lead, Lattice Harbor [S4] · Use as a short pull quote beside the review section.

2 Handovers

“The useful change is that someone taking over a request can read the context in the same place.”

Fictional operations lead, Lattice Harbor [S5] · Use as a text-only social quote about handover context.

3 Team responsibility

“People still need to update the record.”

Fictional operations lead, Lattice Harbor [S5] · Use as a short quote about the human work behind a shared list.

4 Honest evidence

“We have not measured time savings, revenue impact, or customer satisfaction.”

Fictional operations lead, Lattice Harbor [S6] · Keep as an evidence note wherever a reader might infer ROI.

5 Practical advice

“The shared list only stays useful if people maintain it.”

Fictional operations lead, Lattice Harbor [S7] · Use as a closing quote about keeping a workflow useful.

The pilot offer

\$750 one-time pilot

One source-supported 600–900-word case study, one-page sales PDF, five quote or social assets, and one revision. Delivery within seven business days after complete source material, brand assets, and permissions are received.

No new interviews, video, publication, or guaranteed sales are included. The client approves facts, attribution, permissions, and final copy before any external use. A revision covers the agreed source and scope; new sources or extra stories need a separate agreement.

Quality gate: preserve source meaning · trace every claim · verify quote wording · omit unsupported metrics · secure approval before use