

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?

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