

Purchase-order shortfall exception

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01 Intake and scope

Fictional buyer: Orchard Parts Company, a 17-person distributor.

One workflow: handling a shortfall after a customer order is confirmed.

Synthetic intake: the sales team flags shortfalls by email; no shared case log exists.

Five roles: sales, order admin, inventory planning, operations, customer service.

Evidence convention

[SYNTHETIC INPUT] hypothetical starting facts | [PROPOSAL] recommendations

02 Executive assessment

Priority: HIGH [PROPOSAL]. A customer shortfall can be communicated before any person has accepted responsibility for resolving it. The sample assumes no standard acknowledgement time or documented substitute-approval threshold.

First move: create a single exception record with an accountable owner, due time, customer communication status, and supporting decision evidence.

03 Current-state map (illustrative)



Handoff gap A: no case number or acceptance timestamp [SYNTHETIC INPUT].

Handoff gap B: decision and customer response can live in separate threads.

04 Decision-rights and handoff record

Step	Accountable role	Required proof	Exception/escalation
Log shortfall	Order administrator	Case ID + UTC time	If no owner in 2h
Assess options	Inventory planner	Stock alternatives	If no safe substitute
Approve change	Operations lead	Decision + rationale	If no answer in 1 day
Notify customer	Customer service	Message + timestamp	If update overdue

Controls, action plan and boundaries

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05 Six proposed KPI and control checks

1. Exception ownership

100% of shortfalls receive a case ID and named owner.

2. Acknowledgement SLA

An owner acknowledges each exception within 2 work hours.

3. Decision evidence

Each replacement or backorder has timestamped approval.

4. Approval authority

Changes above 5% price variance require operations approval.

5. Customer updates

Notify the customer by the agreed response deadline.

6. Backlog oversight

Review cases open over 1 business day each morning.

06 30 / 60 / 90-day change sequence

DAYS 0-30

Name accountable roles; publish one case-log template; agree on escalation.

DAYS 31-60

Trial the log with synthetic cases; add a daily exception queue and SLAs.

DAYS 61-90

Review six control checks weekly; adjust owner and approval rules.

07 Unknowns and verification before paid delivery

UNKNOWN: actual system of record, policies, service levels, financial thresholds.
UNKNOWN: whether decision rights differ across product or customer segments.
For paid work, inputs are reviewed, assumptions labeled, and one correction allowed.
No live system access, implementation, certification, or guaranteed outcome.

This is a fictional example of the bounded \$75 one-workflow deliverable, not an audit opinion.

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