scellus

REF: WKF26/0004/01 ▪ WORKFLOW SAMPLE 04

Workflow review

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Shipment documents to billing, single lane.

One workflow mapped, the volume checked against the cost of running it, and the honest answer on whether to build now.

PREPARED FOR Example Ship Sdn Bhd	WORKFLOW REVIEWED Shipment documentation and billing reconciliation	REVIEW DATE June 23, 2026	NOTE ISSUED June 26, 2026
PROCESS OWNER Operations lead	SESSION 45 minutes, remote	FEE RM 1,999	CREDIT WINDOW Creditable 60 days

This note records one workflow as it runs today, checks whether the volume behind it justifies a managed workflow system, and names the point at which it would. It is yours to act on: put the fixes below in place, revisit the threshold we name, or come back to us when it is crossed. The figures below are composite ranges drawn from comparable engagements, not measured from your records.

THE VERDICT, UP FRONT

HANDLE INTERNALLY

At 15 to 20 shipments a month on one lane, the person who already knows every shipment by name is a cheaper and faster control than a block stack would be. This note names two fixes your team can make without us, and the threshold that would change the answer.

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01 ▪ MAP

How a shipment reaches your team today.

A shipment moves through one lane, one carrier, and one customs agent. Documents arrive by email over two to three days, get filed by the operations lead, and get reconciled against the carrier's invoice by the same person who created the shipment record. The flow below is the workflow as your team described it in the session.

STAGE	WHAT HAPPENS NOW	WHERE IT LIVES
Create	Shipment details are entered into a shared tracker at booking.	Spreadsheet tracker
Receive	Delivery order, carrier invoice, and customs release arrive by email, usually within three days of departure.	Email
Store	Documents are saved into one shared folder, named by shipment reference.	Shared drive
Reconcile	The operations lead checks the carrier invoice against the tracker entry by eye, usually the same week.	Spreadsheet, tracker

Volume signal. Your team described roughly 15 to 20 shipments a month, one carrier, one customs agent, and one destination port. The same person creates the shipment record, receives the documents, and reconciles the invoice, so nothing currently gets lost between roles because there is only one role.

02 ▪ DIAGNOSIS

Where time and accuracy are lost, and where they are not.

Of the eight patterns we look for, two showed up, and both were minor. This is not the workflow we usually flag as ready to build.

#	BREAKPOINT	WHAT IT COSTS	FIX DIFFICULTY
1	**Occasional inconsistent naming** A shipment reference is sometimes shortened or misspelled in the folder name.	**1 to 2 times** a month. Costs a short search, nothing more.	■ □ □ Low A naming convention fixes it.
2	**No backup if the operations lead is away** Reconciliation pauses until they return.	**2 to 3 days** delay, once a quarter.	■ □ □ Low A shared checklist covers it.

Neither pattern costs enough, at this volume, to justify a managed workflow system. We would rather tell you that now than build something that costs more than it saves.

03 ▪ RISK AREAS

What this note does not prove, and what would change the answer.

A verdict this clean deserves its blind spots named. Three things are true about this assessment that your team should weigh before treating it as settled.

RISK	WHAT IT MEANS
Single point of failure	The entire reconciliation process depends on one person's memory and availability. Nothing in the current workflow would catch an error if that person were unavailable for an extended period, or left the role.
Assessed on one lane only	This note reflects one lane, one carrier, one customs agent. Adding a second lane, a second carrier, or a second destination port changes the shape of the workflow before shipment count changes at all, and would justify a fresh review sooner than the volume threshold below suggests.
No early warning if volume climbs gradually	Manual reconciliation degrades quietly. There is no missed invoice or customer complaint that reliably tells your team the workflow has outgrown its current control. The threshold below needs someone to track it deliberately.

04 ▪ RECOMMENDATION

Do not build yet.

Recommendation: do not build yet. At this volume and on one lane, the manual control your team already runs is cheaper and faster than the block stack this workflow would need.

Two fixes worth making without us.

- Agree a shipment reference format (customer code, date, sequence number) and use it as the folder and file name for every document, so nothing depends on memory to find.
- Write down the reconciliation steps your operations lead already does by eye, so a second person could step in without a handover conversation.

The threshold worth watching. Revisit this review if any of the following happens: shipment volume crosses roughly 40 a month, a second trade lane or carrier is added, or the operations lead role changes hands. Any one of these changes the shape of the workflow enough that manual reconciliation stops being the cheaper option.

> **If the threshold is crossed,** the build we would recommend follows the same shape as our other shipment-to-billing workflows: a Collect block pulling documents into one shipment queue, a Verify block matching them against the carrier invoice, and a Deliver block producing a billing-ready record and audit log. We would scope that against your volume and lane count at the time, not against this note.

05 ▪ ONWARDS

What's next?

1. Use this note internally. The naming convention and the written-down reconciliation steps are yours to put in place without us.
2. Track the threshold above. When shipment volume, lane count, or the operations lead role changes, come back for a fresh review.
3. Come back sooner if something changes. A second lane or a second carrier is worth a new review even before the volume threshold is reached.

Compliance note. *Shipment documents carry supplier, customer, and commercial data. The brief, session notes, and this map are handled under PDPA 2010 and the 2024 Amendment, on Malaysia-resident infrastructure, with no cross-border transfer of client-identifying material.*

The RM 1,999 review fee remains creditable against a build for 60 days if your position changes within that window.