

Corbel Systems Review

Sales Operations Sample

An illustrative Corbel Systems Review of how a growth-stage energy services team works across systems, where commercial handoffs are breaking, and which improvements should be funded first. Backread™ adds patterns from approved AI history in this sample.

DECISION THIS REPORT SUPPORTS

Prioritize the commercial workflows with the highest payback and select the operating model that can improve them without weakening technical, pricing or market controls.

Prepared for AsterPeak Grid Services

Fictional composite company | Canadian and U.S. power markets

Prepared using the Corbel Systems Review method | Backread™ applied to approved AI-history evidence | July 2026

CORBEL SYSTEMS REVIEW

Backread™ is an optional evidence method for approved AI history when useful and authorized. No AI archive is required for a Corbel Systems Review.

This sample contains synthetic company data and illustrative findings. It is not a review of a named real organization.

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ENGAGEMENT FOCUS

The company context shaped every finding

AsterPeak is a fictional North American grid-flexibility and energy-intelligence operator serving large facilities, power producers and utility partners.

112 employees	21 commercial roles	4 market regions	1.25 GW+ flexible load + generation managed
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Three revenue engines share one commercial operating system

Revenue engine	How customer value is sold	Critical delivery dependency
Energy intelligence subscriptions	Ongoing visibility, forecasting, alerts, analytics and portfolio decision support.	Trusted market and facility data; useful interpretation; adoption by energy and operating teams.
Managed market participation	Revenue and cost reduction from demand flexibility, market participation and asset optimization.	Program fit, operating guardrails, event execution, measurement and settlement.
Engineering and infrastructure services	Metering, telemetry, grid connection, control and distributed-energy implementation.	Technical feasibility, project delivery, compliance and safe integration with facility operations.

PRIMARY CUSTOMERS Large commercial and industrial facilities, multi-site portfolios, power producers and utility partners. BUYING GROUP Finance, energy and facility operations, engineering, sustainability, procurement and executive sponsors.	COMMERCIAL DEPENDENCY Sales and marketing create demand; market, engineering, operations, legal and settlement teams validate what can be promised. TOOL LANDSCAPE CRM, email/calendar, Sales Navigator, marketing/content systems, market and load data, metering and delivery platforms.
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QUESTION THAT GOVERNED THE REVIEW

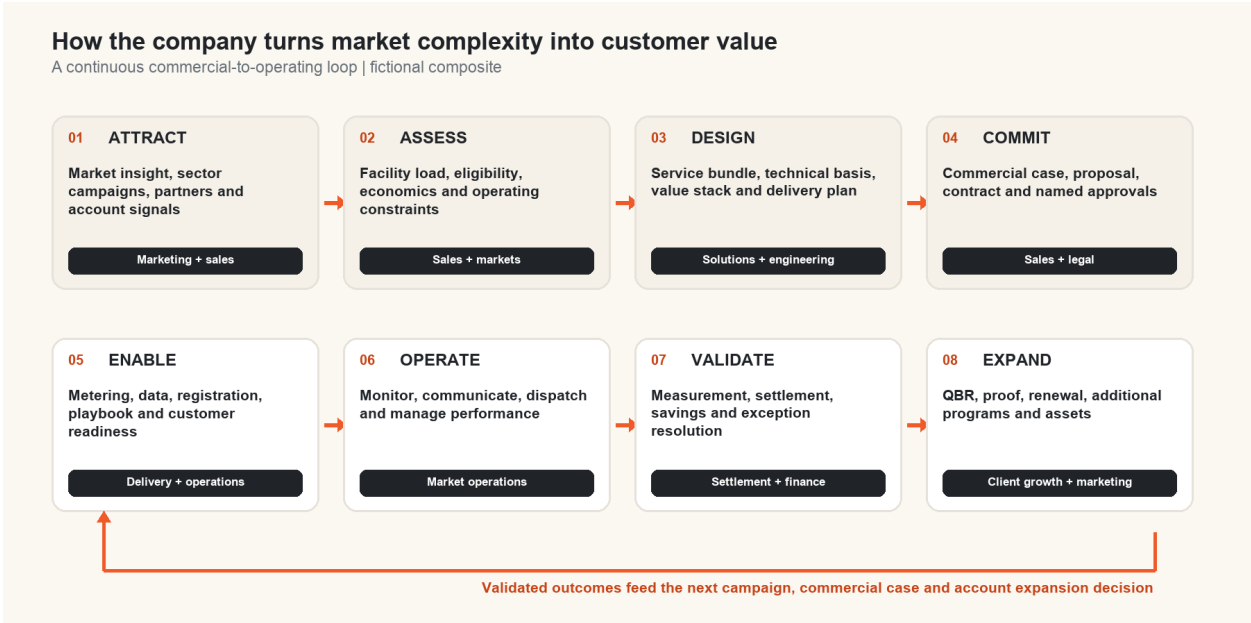
Where can this team increase commercial capacity and speed without weakening program fit, technical feasibility, market accuracy, customer commitments or operating control?

Source: Fictional composite. The profile is informed by public patterns in Canadian and U.S. energy services, but does not describe a named company.

ENGAGEMENT FOCUS

The commercial motion continues long after the contract is signed

AsterPeak sells a credible operating outcome: market and facility insight must become an executable plan, measurable performance and a defensible customer result.



Source: Fictional composite operating model. The stages describe common mechanics in multi-market energy services and do not reproduce a named company's process.

WHY THIS MATTERS TO THE REVIEW

The review followed work across the full loop. It tested whether AI behavior, SOPs, system records and real outputs preserved the customer promise as ownership moved from marketing and sales into markets, engineering, operations, settlement and back into growth.

REVIEW EVIDENCE

The review covered the operating system—not just AI prompts

In this sample, the Corbel Systems Review combined an approved AI export with SOPs, process artifacts, system evidence, commercial outputs and role validation to understand how revenue work actually happened.

684	9,180	96	14
AI conversations	messages reviewed	attachments inventoried	SOP / process artifacts

Evidence stream	What was reviewed	What it established
Approved AI export / takeout	OpenAI / ChatGPT or Anthropic / Claude, depending on the client environment: user-authored conversations, titles, timestamps and attachments.	Recurring jobs, context reconstruction, prompt maturity, evidence use and control patterns.
SOPs and process artifacts	Demand and campaign workflow; account qualification; facility/load assessment; market/program fit; metering readiness; solution design and economics; proposal/contract approval; enrollment; event communication; measurement and settlement; QBR, renewal and proof approval.	Where documented process matched daily work—and where it was bypassed, incomplete, duplicated or not operationalized across the customer lifecycle.
CRM and revenue-system evidence	Field definitions and a sample of 46 opportunities, including stage logic, handoffs, required inputs, next steps and approvals.	Re-entry, missing decision inputs, ownership gaps, wait states and forecast signal quality.
Commercial outputs	Representative campaigns, market updates, proposals, RFP responses, facility assessments, account briefs, call notes, QBRs and customer-proof artifacts.	Quality standards, reuse opportunities, provenance gaps, marketing-to-sales continuity and external-commitment risk.
Interviews and walkthroughs	Five cross-functional role interviews and workflow-validation sessions.	Meaning, burden, exceptions, adoption constraints and the judgment that must remain human-owned.

WHAT THIS ALLOWED THE REVIEW TO KNOW

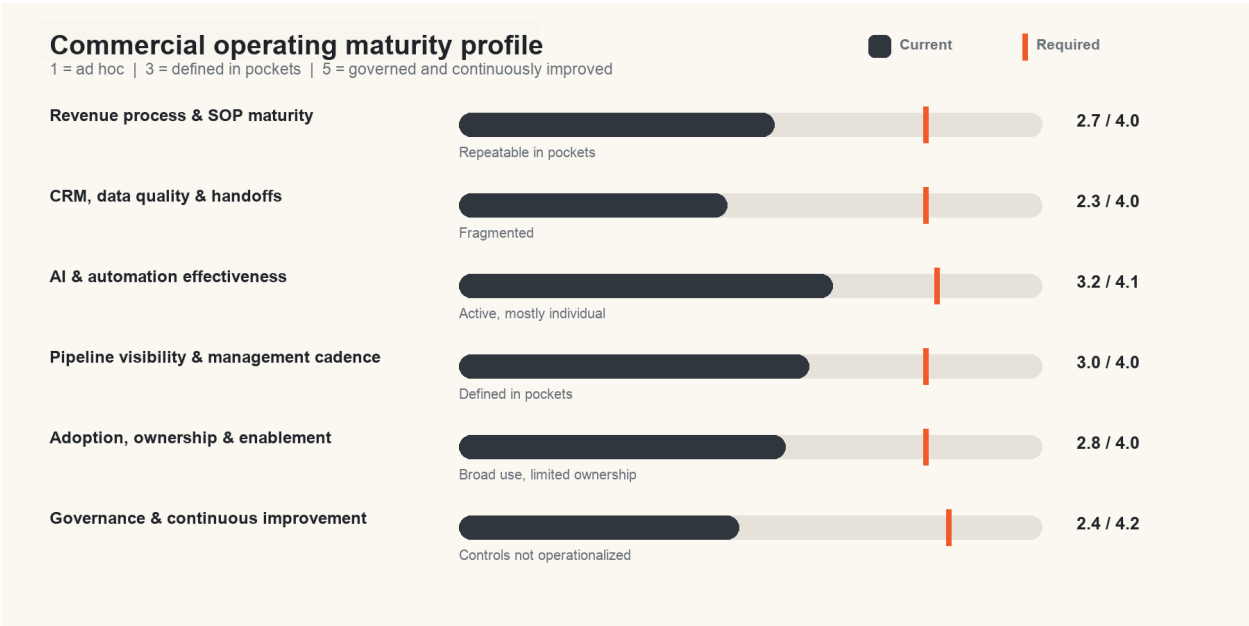
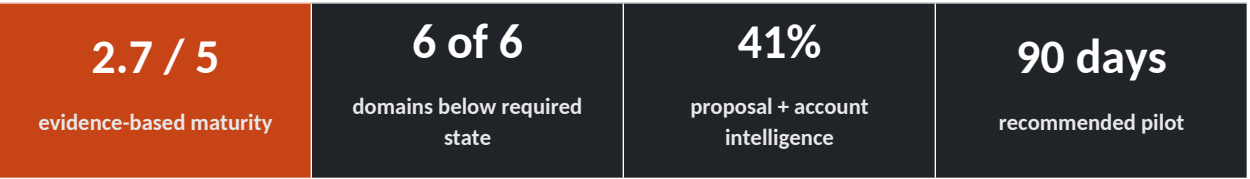
Where AI was compensating for process gaps, which SOPs were not reliably operationalized, where market, facility and customer context broke at handoffs, which controls were missing, and which repeated jobs justified a build decision.

Source: Illustrative sample. A real engagement uses only client-approved sources, preserves source boundaries and reports aggregate or paraphrased findings.

DIAGNOSTIC SNAPSHOT

Commercial operating system at a glance

The team is using AI faster than it is standardizing the workflows, evidence, ownership and controls around it.



EXECUTIVE INTERPRETATION

AI use is ahead of the operating system around it. The immediate constraint is not model access; it is inconsistent SOPs, fragmented commercial data, unclear handoffs and controls that are present but not yet operationalized.

Source: Illustrative maturity scoring synthesized from the fictional corpus, workflow evidence and interviews. Required state is the minimum operating condition for the recommended automations, not a peer benchmark.

EXECUTIVE DECISION

Fund the revenue-system layer, not another generic AI assistant

The strongest payback comes from connecting approved evidence, commercial context and human approvals across the existing toolset.

RECOMMENDATION

Approve a 90-day hybrid pilot led by Sales and Revenue Operations. Keep CRM, marketing, market, metering and delivery platforms as systems of record; use a Corbel workspace to coordinate account-facility briefs, commercial cases and assessment-to-solution handoffs across them.

Why this is the right first move

- AI use is already embedded in revenue work: 684 commercial conversations across 22 months, with the highest volume in proposals, account intelligence and customer communication.
- SOP and system review showed that the recurring constraint is not AI access; it is market and facility context, approved proof, operating constraints, customer history and ownership split across tools and people.
- The top four opportunities can be piloted without replacing core systems or delegating final judgment to an agent.
- A hybrid model preserves control while giving Corbel enough shared context, permissions and monitoring to evolve the automations after launch.

4	90 days	2,200–3,400	100%
priority opportunities	controlled pilot	addressable hours / year*	human approval on commitments

Source: Illustrative analysis of approved AI-history evidence. Capacity range is de-duplicated across workflows and is not a savings commitment.

EXECUTIVE DECISION

Four findings explain the opportunity

The portfolio is shaped by AI behavior, SOP and system evidence, workflow validation and commercial outputs—not by prompt count alone.

01 AI has become the glue between fragmented systems

Commercial staff repeatedly reconstruct the same context before drafting, analyzing or handing work off.

02 Commercial-case and solution-design work carry the largest payback

The work is frequent, multi-party, evidence-heavy and directly tied to cycle time and win quality.

03 Market intelligence and customer outcomes are not yet a closed commercial loop

Deadlines, expert interpretation, performance evidence and customer proof are under-reused in campaigns, seller enablement and expansion.

04 The control problem is approval and provenance, not model access

Final pricing, technical feasibility and market claims must remain source-backed and human-owned.

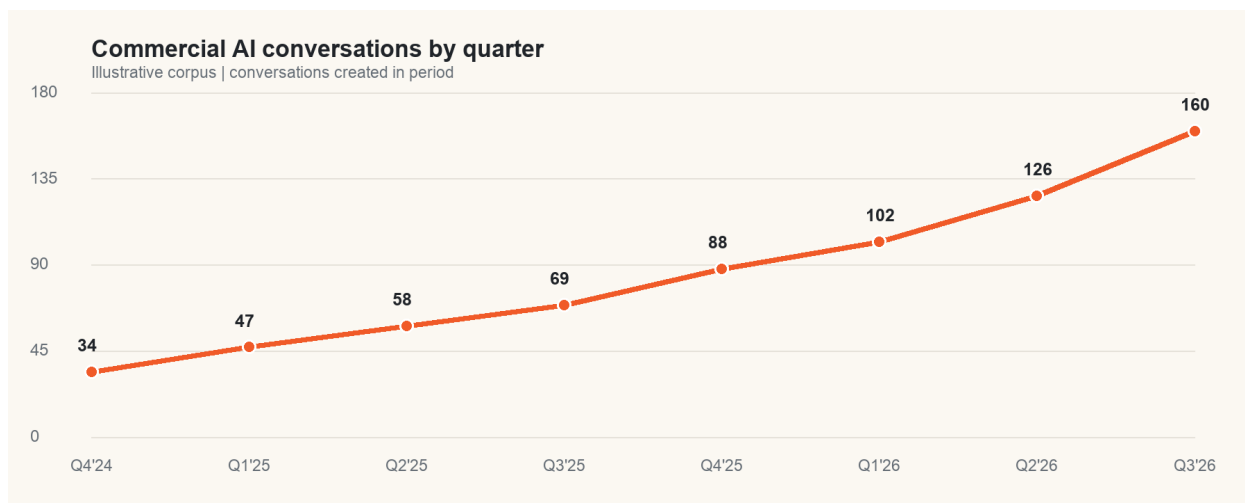
Leadership decision requested

Decision	Recommended choice	Decision gate
What to pilot	Commercial case/RFP, account-facility briefs, CRM capture and assess-to-design handoff	Approve scope and business owners
Where it should live	Hybrid: existing systems of record plus Corbel coordination workspace	Confirm security and integration path
Who should operate it	Start Corbel-managed; select hybrid or handoff at day-60 value review	Choose long-term delivery model

FINDINGS

AI use has shifted from occasional drafting to recurring commercial infrastructure

Quarterly activity increased 3.1x from the first to the latest complete period in the illustrative review window.



Source: Illustrative corpus, 684 conversations created between September 2024 and September 2026.

What the growth means

- AI is no longer an isolated productivity aid; it is part of how staff research accounts, interpret markets, assemble proposals and prepare follow-up.
- Without shared context or standards, growing use also scales inconsistent claims, duplicate work and hidden single-person dependencies.
- The next step is not more seats. It is to turn the few repeatable, valuable patterns into controlled workflows.

FINDINGS

Most commercial AI use clusters around five jobs

Proposal work is the largest theme; account intelligence, follow-up, technical translation and content together show the broader revenue-system need.



Source: Illustrative corpus. Each conversation received one primary theme; multi-theme work is therefore understated.

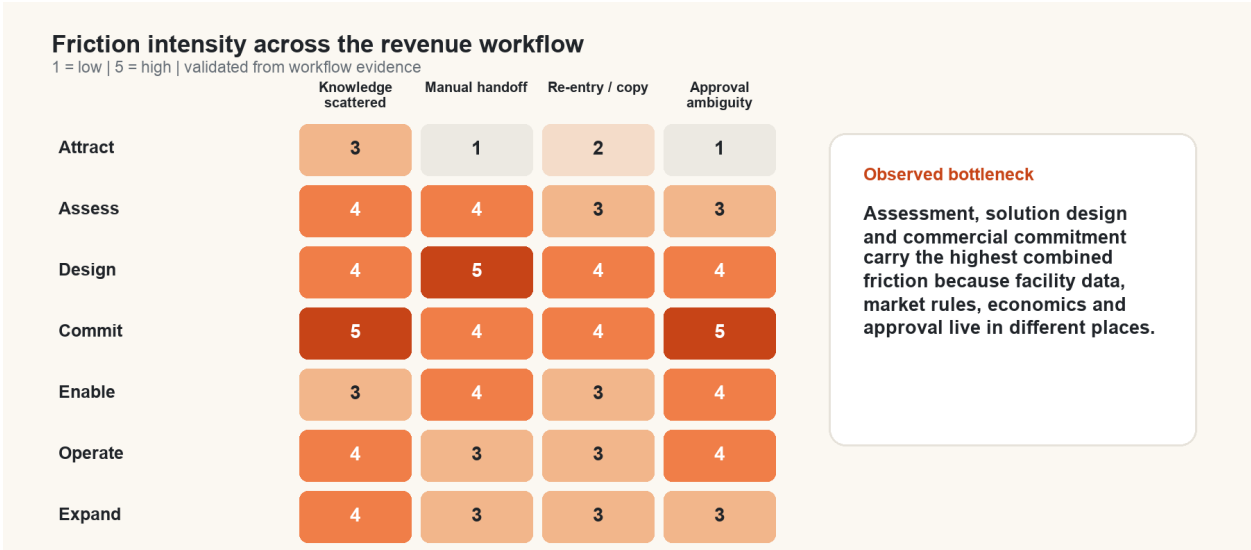
INTERPRETATION

Frequency identifies repetition. Payback depends on what the repetition costs, where it delays revenue, and whether the team can safely systematize it.

FINDINGS

Friction peaks when facility assessment becomes solution design and commercial commitment

The team repeatedly rebuilds context as opportunities move between marketing, sales, markets, engineering, operations and approval owners.



Source: Illustrative workflow validation. Scores combine evidence density, handoff count, rework and approval dependence.

Current-state pattern

Campaigns and account development begin with market signals, sector needs and seller-owned research. Facility assessment then pulls in load data, program rules and operating constraints. Solution design and commercial approval happen across experts, documents, email and chat. CRM often receives a compressed version after the fact. The same context is reconstructed again for enrollment, event support, settlement, QBRs and expansion.

FINDINGS

1. AI is acting as a manual integration layer between commercial systems

Observed: users repeatedly paste, restate or summarize account, market and proof context before they can ask AI to help.

EVIDENCE PATTERN Proposal, technical-translation and account-intelligence conversations frequently reference material that lives in other documents or systems. CURRENT WORKAROUND Users rebuild a mini data room inside each conversation, then copy the output back into email, CRM or a document. OPERATIONAL CONSEQUENCE Time is consumed by context reconstruction; approved claims are hard to distinguish from plausible drafts.	ROOT CAUSE No shared, governed commercial context layer connects CRM, product/market facts, proof assets and approvals. VALUE AT STAKE Proposal cycle time, seller capacity, solution-design load and consistency of claims. IMPLICATION Build retrieval, provenance and approval into the workflow before adding more generative surface area.
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Representative prompts in the illustrative corpus

- Compare this facility's load profile and operating limits with the eligible market programs, and flag what must be confirmed.
- Turn this enrollment deadline and market update into a sector campaign plus a seller follow-up list.
- Draft the commercial case with explicit economic assumptions, source links and technical exceptions.
- Convert these event and settlement results into a QBR narrative and an approved proof-point candidate.

Source: Synthetic paraphrases; no direct prompts or identifying details reproduced.

FINDINGS

2. Commercial growth is increasing handoff load faster than process maturity

Inferred: the team can add sellers faster than it can add expert review capacity unless facility-assessment and solution-design handoffs become more structured.

27% sampled opportunities missing one key assessment input	3.4 average handoffs before commercial case	2.1 days median wait for technical clarification	46% AI call summaries manually re-entered
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What is happening

- Facility and opportunity assessment quality varies by seller and market; experts receive long notes without a consistent decision frame.
- Engineering, market and operations specialists spend time requesting missing load, metering, operating and program-fit inputs before they can design the solution.
- The CRM becomes an archival record rather than the live handoff surface, weakening forecasting and coaching.

Management implication

DO NOT SOLVE THIS WITH A LONGER FORM

The useful intervention is an adaptive facility-assessment brief: pre-fill what is known, ask only for missing decision inputs, show the source of each answer, and route exceptions to the right expert.

Source: Illustrative CRM sample of 46 opportunities and five role-validation interviews.

FINDINGS

3. Market intelligence and customer outcomes are not yet a closed commercial loop

Observed: marketing, delivery and account teams each hold valuable evidence, but it is not consistently converted into demand, seller enablement, proof and expansion.

Commercial evidence	Where it lives	Use today	Missed opportunity
Market changes, program economics and enrollment deadlines	Experts, briefs, market tools	One-off updates and campaigns	Campaign triggers, account alerts and seller-ready talk tracks
Facility questions, objections and operating constraints	Calls, email, CRM notes	Individual memory	Segment-specific enablement and qualification guidance
Event, performance and settlement results	Operations / market systems	Pulled ad hoc for QBRs	Faster outcome packs, renewal and cross-sell signals
Savings, avoided-cost and revenue analysis	Models, email, project folders	Recomputed or rewritten	Approved proof points by market, sector and buyer
Implementation and service milestones	Project and service records	Sparse CRM summary	Confidence evidence in proposals and campaigns

The opportunity

Create a governed commercial evidence loop that turns approved market intelligence, facility questions, operating results and customer stories into campaign triggers, seller guidance, commercial proof and account-expansion signals. Reuse must preserve applicability, confidentiality and ownership.

CONTROL PRINCIPLE

Every reusable claim carries a source, applicability note, owner, approval status and expiry/review date.

FINDINGS

4. The control gap is concentrated in high-consequence outputs

Observed: general AI is useful for drafting and synthesis. Risk rises sharply when a draft becomes a price, technical promise, market statement or external commitment.

Workflow	AI role	Required control	Posture
Account research	Synthesize sources and propose questions	Source links and confidence	Assist
Call follow-up	Draft summary and next steps	Seller approval before sending	Assist
Proposal assembly	Reuse approved content and identify gaps	Claims, pricing and technical review	Co-pilot
Solution design	Structure inputs and surface constraints	Expert owns feasibility	Co-pilot
Pricing / contract commitment	Prepare scenarios only	Named executive and technical approval	Human decides
Dispatch / settlement / regulatory filing	No autonomous action	Authoritative operational controls	Leave in governed system

Minimum control set

- Role-based access to customer, market, technical and commercial context.
- Source links and approved-claim status visible in the draft itself.
- Named human approver before external release or system write-back.
- Audit history, versioning, rollback and performance monitoring after launch.

OPPORTUNITY PORTFOLIO

Eight opportunities, ranked by payback

The ranking balances capacity, cycle time, quality and risk reduction against complexity, dependencies and adoption burden.

#	Opportunity	Verdict	Capacity*	Payback	Effort	Pattern
1	Commercial case / proposal / RFP accelerator	BUILD	1,100–1,600 h	3–6 mo	M	Hybrid
2	Facility assessment -> solution-design handoff	PATCH	650–900 h	3–6 mo	M	CRM + Corbel
3	Account, market and facility briefing	CREATE	500–750 h	<3 mo	S	Corbel workspace
4	Call capture, follow-up and CRM next step	PATCH	400–650 h	<3 mo	S	Existing tools
5	Event -> settlement / QBR / expansion pack	CREATE	450–700 h	6–12 mo	M	Hybrid
6	Market intelligence -> campaign and seller engine	MODIFY	300–500 h	6–12 mo	S/M	Corbel workspace
7	Enrollment and customer-readiness coordination	CREATE	220–380 h	12–18 mo	M	Corbel workspace
8	Autonomous pricing, feasibility or market commitment	LEAVE	N/A	N/A	L	Do not automate

Source: Illustrative ranges; opportunities overlap. De-duplicated portfolio capacity is 2,200–3,400 hours/year, not the sum of row ranges.

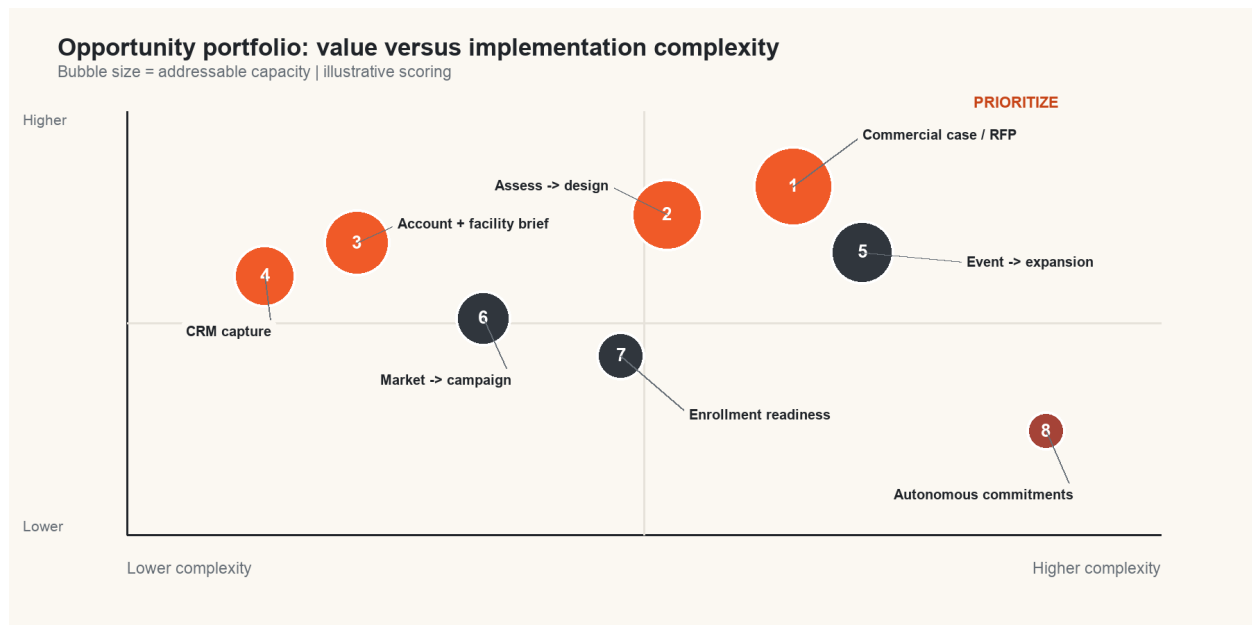
PORTFOLIO DECISION

Pilot opportunities 1–4 together because they share the same context and control foundation.
Sequence opportunities 5–7 after the first value gate. Explicitly leave autonomous commitments out of scope.

OPPORTUNITY PORTFOLIO

The first wave combines two quick wins with two structural improvements

Account-facility briefs and CRM capture prove value quickly; commercial-case and assessment-handoff work create the larger system advantage.



Source: Illustrative scoring. Value includes capacity, cycle time, quality and risk; complexity includes integration, control, dependency and change burden.

How to read the map

The top-right quadrant is not automatically the first build. It contains the most valuable structural opportunities, but the pilot should lead with smaller, visible wins that establish the evidence library, permissions and adoption loop those builds require.

OPPORTUNITY PORTFOLIO

1. Commercial case, proposal and RFP accelerator

Build the context and evidence flow from facility assessment through economic case and proposal; do not merely add a document generator.

CURRENT STATE Sellers and solutions staff search prior proposals, reconstruct facility and market context, request expert input, rebuild economics and manually check claims. INTERVENTION Assemble the commercial case and proposal from CRM, facility assessment, approved evidence, program rules, economic assumptions and role-specific templates. Route gaps and commitments to named reviewers. ARCHITECTURE Hybrid: existing CRM/content repositories remain authoritative; Corbel orchestrates assembly and approval.	EXPECTED PAYBACK 3–6 months; 1,100–1,600 addressable hours/year before overlap adjustments. PILOT KPI 30–50% reduction in first-draft cycle time; >=95% of material claims linked to approved evidence. NON-NEGOTIABLE No final pricing, savings claim, market interpretation or technical commitment leaves without human approval.
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Minimum viable workflow

- Select opportunity and commercial-case type; load CRM, account and facility context.
- Retrieve approved proof, clauses, market/program facts and economic assumptions with sources.
- Generate the commercial case, structured proposal draft and visible exception list.
- Route technical, pricing and commercial claims to named approvers.
- Export the approved package and write status/next steps back to CRM.

OPPORTUNITY PORTFOLIO

2. Facility assessment-to-solution-design handoff

Patch the transition between sales and experts with a dynamic decision brief built around facility, market and operating readiness.

DESIGN PRINCIPLE

Pre-fill what the organization already knows. Ask only for missing decision inputs. Expose uncertainty. Route the exception, not the whole opportunity, to the expert.

Stage	Automation supports	Human owns	Output
Initial fit	Account facts, sector, market eligibility, known facilities and triggers	Seller confirms intent and access	Fit score + gaps
Facility assessment	Load profile, operating limits, site assets and meter/data readiness	Customer + seller validate meaning	Validated assessment brief
Solution intake	Required inputs by program/service; missing-data prompts	Solutions lead accepts readiness	Ready / not-ready decision
Design	Prior examples, assumptions and decision log	Engineering / market experts own feasibility	Solution basis and exceptions
Proposal handback	Approved scope summary and unresolved decisions	Commercial owner accepts commitments	Proposal-ready package

Expected outcome

Fewer expert clarification cycles, more consistent program and service fit, stronger CRM signal and clearer accountability at the point where a facility opportunity becomes an operating commitment.

OPPORTUNITY PORTFOLIO

3-4. Establish visible quick wins in the seller's daily flow

These two opportunities deliver fast value while creating the context and adoption foundation for proposal and handoff work.

03 Account, market and facility brief

Create an executive-ready brief from CRM, public sources, approved market context, known sites/assets and recent activity. Tailor the same evidence for finance, operations, engineering and sustainability stakeholders.

Pilot target: 500-750 addressable hours/year; refresh in minutes, with source links and confidence.

Before a meeting	After implementation
Search account notes, site information, market material and prior correspondence separately.	One role-specific brief with account priorities, facility context, market fit, proof and open questions.
Recreate the brief for each stakeholder and channel.	Reuse a governed evidence set across meeting prep, follow-up and account planning.
Treat web research and internal claims as equivalent.	Distinguish external facts, approved internal evidence and inference.

04 Call capture, follow-up and CRM next step

Summarize the call, separate facts from interpretation, draft follow-up, suggest stage/next action and write back only after seller approval.

Pilot target: 400-650 addressable hours/year; improve required-field completeness by 25-40 percentage points.

ADOPTION RULE

Meet sellers where they already work. If either quick win requires a second record of the opportunity, it will fail.

OPPORTUNITY PORTFOLIO

5–7. Build the commercial learning loop after the first value gate

These opportunities compound the value of the same evidence, but depend on reliable context, taxonomy and ownership.



Opportunity	Why it matters	Sequence trigger
5. Event -> settlement / QBR / expansion pack	Returns performance and settlement evidence to customer value, renewal and cross-sell workflows.	Outcome data and proof-approval model stable
6. Market intelligence -> campaign and seller engine	Turns market changes, deadlines, customer questions and approved proof into campaigns, account alerts and enablement.	Evidence library, campaign triggers and audience taxonomy stable
7. Enrollment and customer-readiness coordination	Coordinates data, metering, registration, operating playbooks, exceptions and owner acceptance before go-live.	First-wave handoff model stable and operations owner named

EXPLICITLY DEFER

Do not build autonomous pricing, final solution commitments or market-facing claims. These are decision rights, not administrative tasks.

RECOMMENDED APPROACH

Four architecture choices were evaluated

The right answer depends on how much shared context and lifecycle management the opportunity requires.

Option	Description	Effort	Leverage	Strength	Assessment
Modify existing systems	Use native CRM, productivity and content features.	Low	Low	Fast, narrow improvements	Good for CRM capture; insufficient for cross-system proposal and proof workflows
Corbel workspace	Create a role-aware coordination workspace across approved systems.	Medium	Medium	Shared context and governance	Useful where assessment, commercial-case and lifecycle modules need common data, permissions and history
Hybrid	Keep systems of record; use Corbel to orchestrate across them.	Medium	High	Control plus speed	Recommended for this portfolio
Replace core systems	Move CRM/content/delivery into a new suite.	High	High	Potential consolidation	Not justified by the evidence; change burden outweighs near-term value

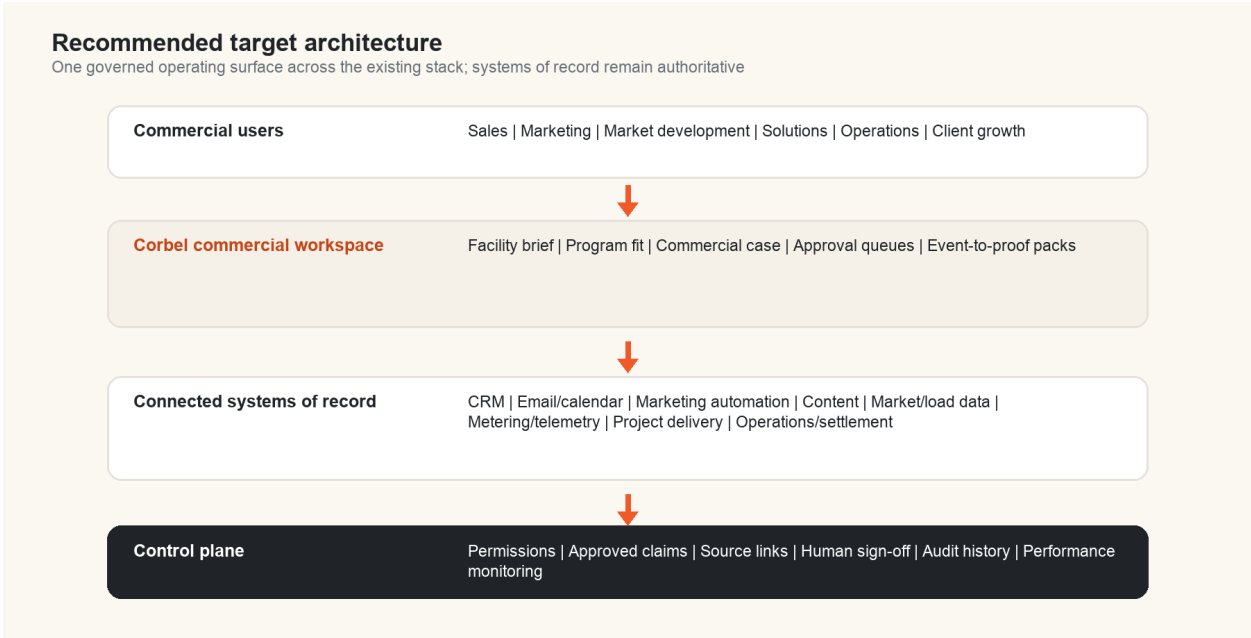
Recommendation: hybrid

- Use existing tools for authoritative customer, campaign, market, facility, metering, project and service records.
- Use a tailored Corbel workspace to bring approved cross-system context, decisions, exception queues, approvals and permitted actions into one governed operating view.
- Avoid a second CRM, second document repository or parallel operating truth.
- Connect only the systems, fields and write-back actions required by the prioritized workflows; expand when measured value justifies it.

RECOMMENDED APPROACH

A tailored workspace could coordinate governed work across the existing stack

It brings approved context, decisions, approvals and permitted actions into one role-aware workspace while systems of record remain authoritative.



Source: Illustrative architecture. Final connector, identity and data-retention design is subject to security and systems discovery.

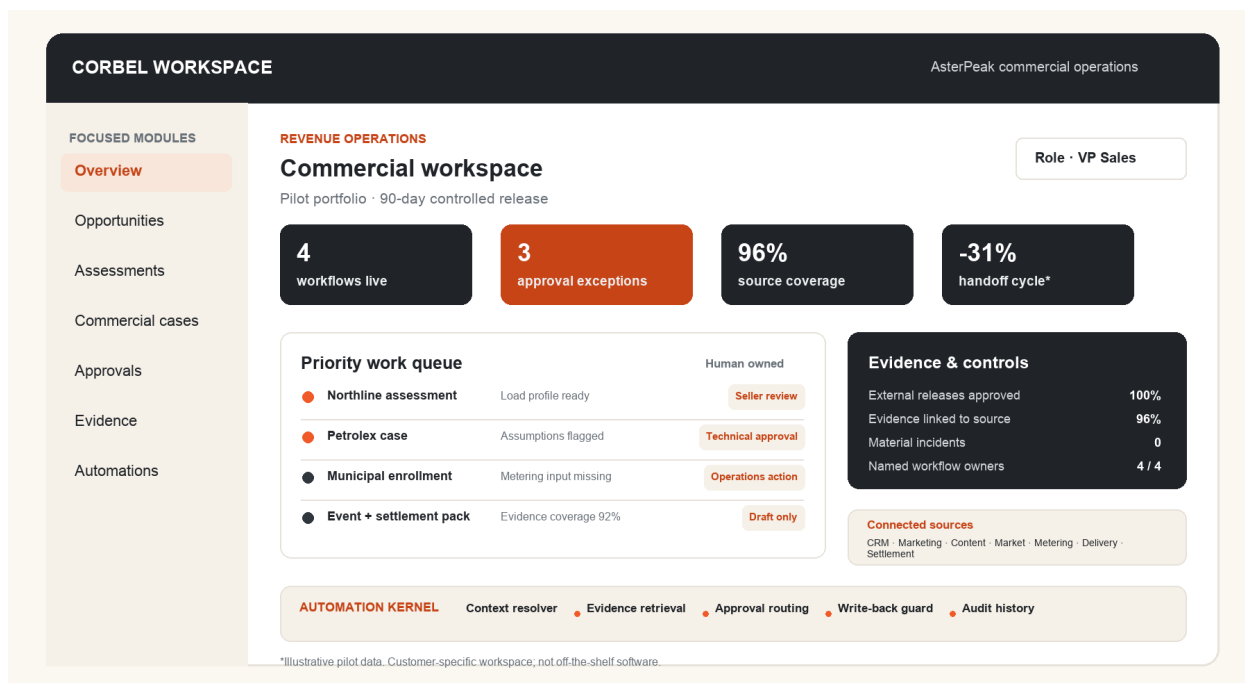
DESIGN AND SCOPE TEST

Corbel does not need every system or every field on day one. Connect the minimum approved context and actions required by each priority workflow. If the workspace cannot show where an answer came from, who approved it and which system owns it, the workflow is not ready to scale.

RECOMMENDED APPROACH

What a Corbel commercial workspace could look like

Connected systems feed one role-aware operating view; approved decisions and permitted actions flow back while systems of record remain in place.



Source: Illustrative interface concept. Modules, data, permissions and integrations are configured to the client; this is not off-the-shelf software or a product commitment.

ONE OPERATING SURFACE, BOUNDED SCOPE

Show the next decision, its source, the human owner, approval state and permitted system action in one place. Connect CRM, email/calendar, marketing, content, market/load, metering, delivery and settlement data only as each workflow requires; do not create a second CRM or uncontrolled data copy.

RECOMMENDED APPROACH

A 90-day controlled pilot creates value before broader implementation commitment

Each phase has a business outcome, control gate and stop/go decision.

Timing	Phase	Work	Gate
0-30 days	Foundation	Confirm owners and security; baseline time/cycle metrics; map systems; build approved-claim registry; select pilot markets, accounts, facilities and commercial-case types.	Data access and control design approved
31-60 days	Quick-win pilot	Launch account-facility briefs and CRM capture; run commercial-case accelerator in draft-only mode; measure acceptance, time and source coverage.	>=70% weekly active pilot users; no material control exceptions
61-90 days	Handoff and scale	Add assessment-to-design brief and approval routing; expand case types; begin event-to-settlement pack design.	Value case confirmed; ownership model selected
3-6 months	Commercial learning loop	Add event/QBR/expansion packs, market-to-campaign workflows and enrollment readiness where first-wave adoption is stable.	Backlog prioritized by measured payback

Week-one visible wins

- Standard account-facility brief with market fit, sources and stakeholder lens.
- Seller-approved call summary, next step and CRM update.
- First approved-claim, economic-assumption and customer-proof registry for one commercial-case type.

STOP CONDITION

Pause expansion if source coverage, user acceptance, approval integrity or system ownership is weaker after automation than before it.

RECOMMENDED APPROACH

Measure business performance and control integrity together

A faster workflow is not successful if it produces weaker evidence, lower trust or parallel records.

Dimension	Pilot metric	90-day target	Owner
Capacity	Median minutes per account-facility brief / commercial-case first draft	30–50% reduction	RevOps
Cycle time	Facility assessment complete -> solution acceptance -> first commercial case	20–35% reduction	Sales + Solutions
Quality	First drafts accepted with minor edits	>=70%	Sales enablement
Evidence	Material claims linked to approved source	>=95%	Marketing / product owner
CRM	Required fields and next step complete	>=90%	Sales managers
Adoption	Weekly active pilot users	>=70%	VP Sales
Control	External commitments released without approval	0	Executive + technical approvers
Reliability	Material automation incidents	0; all minor issues logged	Corbel / IT

Governance cadence

- Weekly pilot review: usage, exceptions, user feedback and backlog.
- Monthly value review: capacity, cycle, quality and control scorecard.
- Quarterly evidence re-read: uncover new patterns, retire low-value automations and re-rank the roadmap; use Backread™ when new approved AI history adds useful signal.

ENGAGEMENT CHOICES

Architecture and service ownership are separate decisions

The same hybrid architecture can be Corbel-managed, client-operated after handoff, or split between the two.

Model	Corbel responsibility	Client burden	Commercial shape	Best fit
Managed Automation Partnership	Corbel operates connectors, prompts/workflows, monitoring, releases and backlog, with periodic evidence re-reads and optional Backread™ analysis when authorized.	Low	Ongoing retainer	Teams that want continuous improvement without building an internal automation function
Build + train handoff	Corbel implements, documents, trains client admins and provides 30-day hypercare; client owns maintenance and improvement.	High	Project + optional support	Teams with capable RevOps / IT ownership and predictable workflows
Hybrid capability transfer	Corbel manages high-risk/shared foundations; client owns templates, low-risk automations and business configuration after training.	Medium	Smaller retainer + enablement	Recommended after the pilot for balanced control, speed and internal capability

Recommended ownership path

- Days 0–90: Corbel-managed pilot so workflow quality, controls and value are stabilized before transfer.
- Day 60: assess client operating capacity and choose long-term model.
- After day 90: default to hybrid capability transfer unless leadership prefers a full managed retainer or has strong internal ownership.

ENGAGEMENT CHOICES

Recommended decision and next step

Authorize a focused design sprint now; reserve the broader implementation decision for measured evidence from the pilot.

DECISION REQUESTED

Authorize a 30-day design and foundation sprint covering commercial case/RFP, account-facility brief, CRM capture and facility assessment-to-design workflows, followed by a 60-day controlled pilot.

Leadership choice	Recommended answer	What approval authorizes
Pilot scope	Opportunities 1-4	Workflow design, configuration and draft-only testing
Architecture	Hybrid	Connections to approved systems and a Corbel coordination workspace
Controls	Human approval on every external commitment	Approval matrix, evidence registry and audit history
Initial operating model	Corbel-managed for 90 days	Monitoring, releases, incident handling and weekly value review
Long-term model	Decide at day 60	Managed retainer, hybrid capability transfer or build-and-train handoff

What success would make possible

A commercial operating layer that gets better as the team works: each approved commercial case strengthens the evidence library, each facility assessment improves the fit model, each market change improves campaigns, each customer outcome strengthens expansion, and each quarterly evidence re-read reveals the next highest-payback opportunity.

The objective is not to automate the judgment that makes the company credible. It is to remove the reconstruction, re-entry and coordination work that prevents that judgment from scaling.

APPENDIX

Review method, scoring and confidence

The Corbel Systems Review combines observed work, validated process burden, system evidence and implementation judgment. Backread™ can add patterns from approved AI history when it is useful and authorized.

Priority score

Priority = (capacity + cycle time + quality/risk value) x confidence, adjusted for implementation complexity, control risk, dependencies and adoption burden. Scores establish relative sequence; they do not forecast booked financial results.

Evidence class	Definition	How it influenced the report
Corpus evidence	Conversation counts, prompt patterns, attachments and turn depth	Established repetition and complexity
Process evidence	Demand, facility-assessment, market-fit, solution, proposal, enrollment, operations, settlement and growth SOPs; CRM fields and representative outputs	Located handoffs, re-entry, decision rights and control points across the lifecycle
Human validation	Role interviews and finding review	Confirmed meaning, burden and adoption constraints
Implementation judgment	Architecture, integration, control and change assessment	Converted findings into delivery options
Illustrative economics	Role counts, time ranges and loaded-capacity assumptions	Estimated payback bands for prioritization

Confidence convention

- High: repeated in the corpus and confirmed by process evidence plus interview validation.
- Medium: repeated in the corpus and supported by one additional evidence class.
- Directional: plausible and useful for design, but requires baseline measurement in the pilot.

PRIVACY BOUNDARY

Only aggregate and paraphrased findings appear in the report. Raw conversations remain in approved private storage and are deleted or retained according to the engagement agreement.

APPENDIX

Opportunity register and validation questions

The 30-day sprint should replace illustrative ranges with measured baselines and final system decisions.

#	Opportunity	Confidence	Validation required	Action
1	Commercial case / proposal / RFP	High	Case types, economic assumptions, claim ownership, approval path, repository quality	Proceed
2	Facility assessment -> design	High	Required load, site, market, meter and operating inputs; acceptance criteria	Proceed
3	Account + facility brief	High	Source permissions, market-fit logic, stakeholder templates, refresh cadence	Proceed
4	CRM capture	High	CRM fields/API, email/calendar boundaries, seller approval UX	Proceed
5	Event -> settlement / expansion	Medium	Performance and settlement data access, proof approval, account-growth ownership	Design after gate
6	Market -> campaign + enablement	Medium	Market triggers, editorial governance, audience taxonomy, publishing and seller workflow	Design after gate
7	Enrollment readiness	Directional	Data, metering, registration, customer playbook, exception and acceptance ownership	Defer
8	Autonomous commitments	High	None; remains out of scope	Leave

Assumptions to replace during discovery

- Commercial role counts, loaded rates and frequency/time estimates.
- CRM, content repository, market/product and delivery-system connector availability.
- Data classification, retention, regional hosting and access-control requirements.
- Proposal volume, cycle-time baseline, win/loss drivers and current approval latency.
- Internal capacity to own automation operations after the 90-day pilot.

END STATE

A measured, governed automation portfolio with a clear owner for every workflow and a repeatable Corbel Review cycle for discovering what to improve next.

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