

Make the case with measured work

WORKFLOW BUSINESS-CASE WORKSHEET

Use this alongside the companion browser calculator. Compare one defined process before and during a pilot. It can support a decision to change the process, keep it, or investigate further. It does not assume CredenShare creates a saving.

Collect comparable inputs

Count a **handoff** consistently: one authorized transfer/collection task, including its preparation and closure work. Do not count every reminder as a new handoff. Keep elapsed waiting time separate from staff effort.

Input	How to establish it
Monthly handoffs	Count a stated period; explain any seasonality or projected volume.
Current minutes per handoff	Active preparation, coordination, handling and closure effort; avoid double-counting time across overlapping tasks.
Pilot minutes per handoff	Measure the same scope using the changed process. Retain failed or difficult cases rather than timing only the best examples.
Added monthly administration	Training maintenance, exception handling and operational checks not already in per-handoff time.
Loaded hourly cost	An approved internal labor assumption, not necessarily money recoverable as cash.
Implementation effort/cost	One-time staff hours and actual external setup charges; keep these separate.
Recurring cost difference	New cost minus costs that will genuinely stop. Existing tools that remain are not avoidable savings.

Write the assumptions first

Process: [one workflow]. Baseline period/sample: [actual]. Pilot period/sample: [actual]. Volume basis: [count or forecast]. Labor-cost basis: [approved assumption]. Exclusions: [specific]. The two samples differ in [known ways].

If there is no measured pilot, call the result a **scenario**, not a demonstrated improvement. The calculator starts with blank inputs and has an explicitly labeled hypothetical example button.

Output to take to a decision-maker

A useful summary says: the measured change in effort, the value assigned to that capacity, the recurring cost difference, one-time investment, and what still needs validation. It need not contain a large positive number to be useful.

The calculations, without hidden assumptions

Let **V** be monthly handoffs; **B** baseline minutes each; **P** pilot minutes each; **A** added monthly administration hours; **R** loaded hourly cost; **D** recurring monthly cost difference; **H** one-time implementation hours; **S** one-time external setup cost; and **N** evaluation months.

Result	Formula
Monthly capacity change	$V \times (B - P) \div 60 - A$
Monthly modeled labor value	Capacity change $\times$ R
Monthly modeled net value	Modeled labor value $- D$
One-time modeled investment	$H \times R + S$
Net modeled value over N months	$N \times \text{monthly modeled net value} - \text{one-time modeled investment}$
Labor-valued break-even	One-time modeled investment $\div$ monthly modeled net value, only when net value is positive

These are original arithmetic conventions for this worksheet, not financial forecasts. A negative capacity change is a result to investigate, not a number to hide. The calculator retains it.

Keep cash separate

The browser tool also accepts **monthly cash costs demonstrably avoided** and **new monthly cash costs**, plus one-time cash outlay. It reports a separate cash-only balance. Do not copy labor value into cash avoided unless there is a documented actual cash reduction. Annual prepayment timing, tax, financing and discounting are outside this simple recurring comparison; use a dated cash schedule for those decisions.

Hypothetical example

120 handoffs/month, 12 baseline minutes versus 7 pilot minutes, 2 added admin hours, 60 units/hour loaded cost, 150 units/month extra recurring cost, 6 setup hours and 300 units external setup:

8 capacity hours/month; 480 labor-value units; 330 net modeled units/month; 660 one-time modeled units; 2 months labor-valued break-even. If monthly avoided cash is zero and new monthly cash expense is 150, the cash-only outcome is negative. Both statements can be true.

No currency or current CredenShare price is assumed by that example. Choose one currency and do not combine different currencies in the same calculation.

Decide what to do next

Run a small operational pilot

Choose the workflow, eligible participants and a representative case set before observing results. Track active minutes and failure reasons using the same boundaries in both periods. Capture authorization, completion and closure quality as well as speed. A faster process that bypasses an important control is not an acceptable improvement.

Interpret four possible outcomes

Outcome	Practical response
Less effort, acceptable controls, positive modeled value	Consider a bounded rollout; validate the recurring workload and adoption assumptions.
Less effort, negative cash-only result	Decide whether capacity, control or service benefits justify the actual cash expense. Do not call it cash-neutral.
Little change in time, better documented process	Describe the non-time benefit directly and test whether it matters to the owner. Do not invent a cost saving.
More effort or repeated failures	Inspect the troublesome step, settings and recipient experience before expanding.

Ready-to-use internal summary

We compared [workflow] across [baseline and pilot scope]. The observed active effort was [B] versus [P] minutes per case; [A] hours of additional monthly administration were included. At [V] cases/month this represents [capacity result], subject to [limitations]. The modeled labor-valued outcome is [result]; the separate cash-only outcome is [result]. We recommend [decision] and will verify [assumption] by [date/owner].

Sharing the result

Use the calculator's Print / Save PDF function after reviewing every input. The supplied tool stores inputs in page memory and makes no network calls; saving a report creates a local file you must handle appropriately. It does not send the calculation to CredenShare.

Keep sensitive business assumptions out of publicly shared screenshots. Mark hypothetical figures as hypothetical.