例 ILLUSTRATIVE EXAMPLE · NOT A REAL CLIENT

段取り · WORKFLOW MAP — HOW THE WORK RUNS TODAY

Invoice processing, mapped step by step

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段取り八分、仕事二分

WORKFLOW	WHO OWNS IT	HOW OFTEN	WHAT "DONE RIGHT" LOOKS LIKE
Accounts-payable invoice processing	AP / Finance Operations lead	High volume — many invoices / week	Paid within terms, full audit trail, no wrong payments

THE STEP — HOW IT RUNS TODAY					WHERE IT HURTS		DECISIONS MADE HERE	
Step	**What happens (a person does this today)**	**Who**	**System / tool**	**Time**	**What's painful about it**	**Pain type**	**Decision made at this step**	**Rule, or a person's call?**
1	An invoice arrives via the capture app, AP mailbox, or direct email; the clerk sorts and opens each one.	AP clerk	Intake (mailbox / app)	~5 min	Three intake paths, no single queue	No record / hard to track	—	Clear rule
2	Clerk looks up the vendor and the matching purchase order.	AP clerk	ERP	5–10 min			Is this a known vendor with a valid PO?	Clear rule
3	Clerk matches line items — quantities, unit prices, totals, tax — against the PO by hand.	AP clerk	ERP + invoice	10–15 min	Matched by hand, easy to miss a discrepancy	Manual re-keying	Do the lines match the PO (within 2% tolerance)?	Clear rule
4	Clerk checks the budget — cost center and budget ID; emails IT if one is missing and waits.	AP clerk	Budgeting tool	~5 min + waits	Missing budget ID stalls the whole invoice	Slow / waiting	Is the budget valid and funded?	Sometimes a person
5	Clerk enters the invoice into the approval system and routes it by authority level.	AP clerk → Approver	Approval system	Hours / days	Sits in an approver's queue, no prioritisation	Slow / waiting	Approve this payment?	Always a person
6	On approval, clerk pays, closes the PO in the ERP, and files the record.	AP clerk	ERP + document store	~10 min	Same data re-keyed into two more systems	Manual re-keying	—	Clear rule

The step, as it runs today · Where it hurts · A decision is made here · Clear rule, or a person's call

Person-first: this maps the workflow as people run it today. What an agent could take on — and where a person must always stay in control — comes next, in preparation.