SIDLEY ESTIMATING & CONSULTING LLC

Sidley Process Improvement Portfolio

Customer intake, process improvement, and reporting dashboard samples

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Business Process Analyst and Consultant

Sidley business analysis approach

Discover → Map current state → Analyze gaps → Design future state → Support adoption

PORTFOLIO NOTICE

The materials in this portfolio are illustrative sample work created to demonstrate Sidley’s approach and capabilities. They are not represented as completed Sidley client engagements. Professional experience is summarized without confidential or proprietary information.

Portfolio Overview

Sidley helps small businesses improve inefficient processes, document operations, clarify requirements, organize delivery work, and use practical reporting to make informed decisions. This portfolio shows the type and quality of work a client can expect through three connected demonstration projects.

Portfolio example	Business need	Representative deliverables
Requirements and User Story Package	Define a central customer-request tracking solution	Business requirements, user stories, acceptance criteria, traceability
Process Improvement Case Study	Reduce delays and missed follow-ups in customer requests	Current-state and future-state maps, gap analysis, recommendations, SOP
Management Reporting Dashboard	Give leadership a clear view of volume, response time and workload	KPIs, trends, status analysis and management actions

Process Improvement Services

- Business process review and improvement
- Requirements elicitation and documentation
- User stories and acceptance criteria
- Agile backlog and delivery support
- Testing and user acceptance coordination
- Operational reporting and dashboard development

Professional Foundation

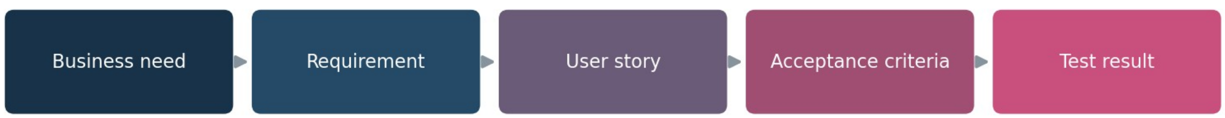
Rose brings more than 15 years of experience supporting federal technology programs across multiple agencies. Her work includes business process improvement, requirements management, ServiceNow enhancements, Agile and SAFe delivery, testing, release coordination, data analysis, dashboards, and stakeholder communication. She has supported enterprise platforms used by thousands of staff, delivered requirements for more than 20 ServiceNow module enhancements, and coordinated work across multiple concurrent applications and cross-functional teams.

1 Requirements and User Story Package

Customer Request Tracking Solution

ClearPath needs a shared solution that captures customer requests, assigns work, tracks status, and supports management reporting. The sample package below demonstrates how Sidley translates a business problem into testable requirements.

From business need to validated outcome



Business Objectives

- Capture all requests in one place.
- Improve the completeness and consistency of intake information.
- Make ownership, status, priority and target dates visible.
- Provide leadership with timely operational metrics.

Stakeholders

Stakeholder	Primary need	Decision or responsibility
Business owner	Visibility into demand and service performance	Approves priorities and process changes
Request coordinator	Consistent intake and assignment	Reviews and routes requests
Service staff	Clear work queue and due dates	Completes and updates assigned work
Customer	Simple submission and status communication	Provides complete request information

Business and Functional Requirements

ID	Requirement	Priority	Acceptance measure
BR-01	The business shall maintain one shared record for every customer request.	Must	Each submitted request receives a unique ID.
FR-01	The solution shall capture customer name, contact information, request type, description and desired date.	Must	Submission is blocked when a required field is blank.
FR-02	The solution shall allow authorized staff to assign an owner, priority, status and target date.	Must	Assigned values are saved and visible in the request record.
FR-03	The solution shall record status changes and completion dates.	Must	A status change updates the request history.
FR-04	The solution shall identify open requests past their target date.	Should	Overdue items appear in the management view.
RR-01	The solution shall summarize monthly request volume, completion rate, average response time and workload by owner.	Should	Dashboard results match the underlying request records.

Sample User Stories and Acceptance Criteria

US-01 Request submission

As a customer, I want to submit a complete service request so that the business can evaluate and respond to my need.

- Given I am completing the request form, when a required field is blank, then the form identifies the missing field and does not submit.
- Given all required fields are complete, when I submit the form, then the system creates a unique request ID and confirms receipt.

US-02 Work assignment

As a request coordinator, I want to assign an owner, priority and target date so that responsibility and timing are clear.

- Given a new request exists, when I enter the required assignment values, then the request is added to the owner's work queue.
- When the owner or target date changes, then the latest values are shown in the request record.

US-03 Overdue review

As a business owner, I want to see overdue open requests so that I can remove blockers and improve follow-up.

- Given an open request has a target date before today, when I open the dashboard, then the request is counted as overdue.
- Completed or cancelled requests are excluded from the overdue count.

Requirements Traceability Sample

Requirement	User story	Test	Expected result	Status
FR-01	US-01	Submit with missing required field	Submission is blocked and missing field is identified	Ready
FR-02	US-02	Assign owner, priority and target date	Values save and appear in the work queue	Ready
FR-04	US-03	Open dashboard with an overdue request	Request is included in overdue count	Ready
RR-01	US-03	Compare dashboard totals to source records	Dashboard totals match source records	Ready

Delivery Support

Sidley can also support backlog refinement, stakeholder reviews, test planning, user acceptance testing, issue tracking, release readiness, and adoption documentation. The level of support can be tailored to the client’s existing tools and delivery approach.

User Acceptance Testing Checklist

This checklist shows how the sample requirements would be validated with business users before release.

Test area	Validation question	Evidence	Result
Request intake	Are required fields enforced and is a unique ID created?	Submitted test request and confirmation	Pass
Assignment	Can authorized staff assign owner, priority and target date?	Updated request record	Pass
Status tracking	Are status changes and completion dates recorded?	Request history	Pass
Overdue reporting	Are past-due open requests included and completed requests excluded?	Dashboard comparison	Pass
Metric accuracy	Do dashboard totals match the underlying request records?	Reconciliation check	Pass

Release Readiness Questions

- Have business owners approved the future-state process?
- Are user roles and access needs confirmed?
- Are high-priority defects resolved or formally accepted?
- Are the SOP, training materials and support contacts ready?
- Has leadership confirmed the first reporting review date?

2 Customer Intake and Follow Up Process Improvement

Customer Request Intake and Follow Up

Demonstration client: ClearPath Services, a fictional small professional-services company. ClearPath receives customer requests through email, telephone calls, and text messages. Staff record some requests in personal spreadsheets, which makes ownership, priority, and follow-up difficult to track.

Current state

1. Requests arrive by email, phone and text
2. Information is incomplete
3. Staff re-enter details in spreadsheets
4. Follow-up depends on memory

Future state

1. One standard intake form
2. Required fields captured once
3. Central request tracker
4. Owner and follow-up date assigned

Business Problem

The current process has no single intake channel or shared source of truth. Staff may begin work before required details are available, and managers cannot quickly see aging requests or workload by owner.

Observed Gaps

Gap	Operational effect	Recommended control
Multiple intake channels	Requests can be overlooked or duplicated	Use one standard intake form
Incomplete information	Staff spend time requesting missing details	Require essential fields before submission
Unclear ownership	Follow-up depends on individual memory	Assign an owner and due date
Limited reporting	Managers cannot see volume, aging or patterns	Maintain a central tracker and dashboard

Recommended Future State

Sidley business analysis approach

- Use a standard online request form for all new work.
- Create a unique request ID and record every submission in a shared tracker.
- Assign an owner, priority, target date, and next action.
- Review open and overdue requests during a short weekly operating meeting.
- Use dashboard trends to address recurring request types and workload issues.

Sample Standard Operating Procedure

Step	Owner	Action	Output
1	Request coordinator	Review the submitted form for required information	Complete request record
2	Request coordinator	Assign category, priority, owner and target date	Assigned request
3	Assigned owner	Contact customer if clarification is needed and record the next action	Updated request
4	Assigned owner	Complete work and document the outcome	Completed request
5	Manager	Review weekly dashboard and address overdue or recurring issues	Management actions

Projected Benefits

Expected benefits include fewer missed requests, more complete information at intake, clearer accountability, faster follow-up, and better visibility into service demand. These are projected outcomes for the illustrative scenario, not measured Sidley client results.

Customer Service Request Form

Illustrative sample form. Required fields are marked with an asterisk.

CUSTOMER INFORMATION

Full name *

____

Email address *

____

Telephone number *

____

Preferred contact method
( ) Email ( ) Telephone ( ) Text message

REQUEST DETAILS

What service do you need? *
( ) Process review ( ) Business analysis support ( ) Reporting support ( ) Other

Describe your request or current problem. *

____

____

What result would you like to achieve? *

____

Desired completion date *

____

Supporting documents
Upload any file that will help us understand your request.

SUBMIT REQUEST

Form Field Design

Field	Purpose	Required
Customer name and contact	Supports confirmation and follow-up	Yes
Request type	Routes the request and supports trend reporting	Yes
Request description	Explains the need, desired outcome and relevant details	Yes
Desired completion date	Helps evaluate urgency and scheduling	Yes
Supporting documents	Provides information needed to begin work	When applicable
Preferred contact method	Supports clear customer communication	No

Request Tracker Sample

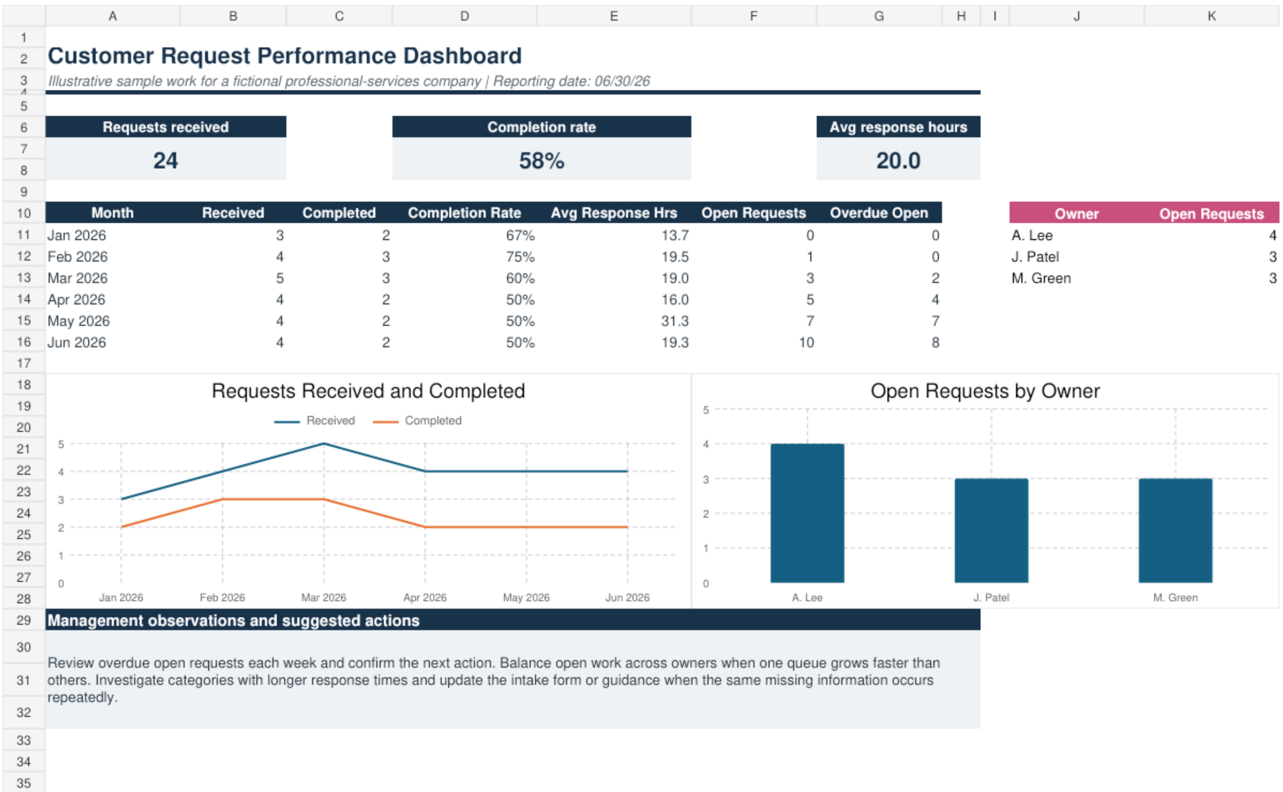
ID	Received	Type	Owner	Target	Status
REQ-101	07/08/26	Process review	A. Lee	07/22/26	In progress
REQ-102	07/10/26	Requirements	J. Patel	07/25/26	New
REQ-103	07/12/26	Reporting	M. Green	07/29/26	Assigned

The companion Excel workbook provides a larger working tracker with sample records, calculations and management charts.

3 Management Reporting Dashboard

Customer Request Performance

The companion Excel workbook demonstrates an editable management dashboard for the same fictional company. It includes sample request-level data, formula-driven performance indicators, monthly trends, request status, workload by owner, and a short management action summary.



Customer Request Performance Dashboard

Illustrative sample work for a fictional professional-services company | Reporting date: 06/30/26

Requests received	Completion rate	Avg response hours
24	58%	20.0

Month	Received	Completed	Completion Rate	Avg Response Hrs	Open Requests	Overdue Open
Jan 2026	3	2	67%	13.7	0	0
Feb 2026	4	3	75%	19.5	1	0
Mar 2026	5	3	60%	19.0	3	2
Apr 2026	4	2	50%	16.0	5	4
May 2026	4	2	50%	31.3	7	7
Jun 2026	4	2	50%	19.3	10	8

Owner	Open Requests
A. Lee	4
J. Patel	3
M. Green	3

Management observations and suggested actions

Review overdue open requests each week and confirm the next action. Balance open work across owners when one queue grows faster than others. Investigate categories with longer response times and update the intake form or guidance when the same missing information occurs repeatedly.

Dashboard Questions

- How many requests were received and completed?
- What percentage of requests were completed?
- How quickly did the team respond?
- How many open requests are overdue?
- Which request categories and owners carry the most work?
- Are service levels improving or declining over time?

Key Performance Indicators

KPI	Definition	Management use
Requests received	Count of requests created during the reporting period	Understand demand
Completion rate	Completed requests divided by requests received	Monitor throughput
Average first response time	Average hours between request receipt and first response	Monitor responsiveness
Open overdue requests	Open requests with a target date before the reporting date	Focus follow-up
Open workload by owner	Count of open requests assigned to each owner	Balance capacity

Illustrative Management Summary

Demand increased during the sample period while completion performance varied by month. Leadership should review overdue items weekly, confirm ownership for all open requests, and investigate request categories with longer response times. The workbook is designed so a client can replace the illustrative data with its own records and retain the dashboard structure.

Companion Workbook

File: Sidley Management Reporting Dashboard.xlsx

Sample Deliverables Gallery

The examples below represent materials Sidley can tailor to the client's size, workflow, tools and engagement goals.

Process improvement	Requirements and delivery	Management support
Current-state process map	Business requirements document	Project status report
Future-state process map	User stories and acceptance criteria	Risk and issue log
SOP and job aid	Requirements traceability table	Decision and action log
Process recommendations	UAT checklist and test results	Operational dashboard
Training guide	Prioritized backlog	Workflow tracker

Business Process Improvement Packages

Package	Starting price	Typical scope
Quick Fix	$750	Focused review of one immediate process problem with practical recommendations
Improvement	$1,500+	Current-state analysis, future-state workflow and supporting documentation
Improvement and Automation	$3,000+	Process redesign plus forms, workflows, testing, documentation and training support

Next Step

Not sure what is slowing your business down? Schedule an introductory conversation to identify the right starting point.

How Sidley Would Support a Client

Sidley business analysis approach

Phase	Typical activities	Possible deliverables
Discover	Stakeholder interviews, document review and goal setting	Engagement scope and interview notes
Assess	Current-state mapping, data review and gap analysis	Process map and findings
Design	Future-state workflow, requirements and prioritization	Recommendations, requirements and backlog
Deliver	Documentation, testing and implementation support	SOP, test package and status reporting
Sustain	Training, measures and follow-up review	Dashboard, job aids and improvement actions

About Rose Hammond Akpebu

Rose Hammond-Akpebu, M.S., PMP, is a senior business analyst and business process professional with experience supporting complex federal health and technology initiatives. She has worked with business stakeholders, product owners, developers, testers, and program leaders to translate business needs into practical processes, requirements, user stories, acceptance criteria, reports, and tested solutions.

Credentials and Selected Capabilities

- Project Management Professional
- M.S. in Computer Science and B.A. in Mathematics
- SAFe Advanced Scrum Master and SAFe Practitioner
- ITIL Foundations
- ServiceNow, JIRA, Confluence, Power BI, Excel, SharePoint and Microsoft collaboration tools

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Start with a Clearer Process

A focused conversation can help identify where requests stall, information is lost, responsibilities are unclear, or reporting does not support timely decisions.

Sidley business analysis approach

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