

PRODUCT WORKFLOW STUDY

From scattered sales data to role-aware capital, margin and contract decisions

A commercial-intelligence workflow showing how Corexa can give owners, wholesale managers, sales managers and BDMs different views of the same accounts, placed equipment, coffee commitments and capital exposure.

Evidence level stated clearly throughout

Owner

Whole portfolio

Sales Manager

Team scope

BDM

Own accounts

Capital + coffee

One view



THE CHALLENGE

Why the existing process breaks down

The workflow becomes unreliable when evidence, ownership and next actions are separated across documents, messages, spreadsheets or individual memory.

01

Revenue hides capital exposure

A high-revenue account can still have unrecovered equipment investment.

02

Contract endings are operational even

The sales team, warehouse and owner need to know what equipment may become available.

03

BDM performance lacks context

Raw sales totals do not show coffee commitment, service cost or deployed capital.

04

Everyone sees too much or too little

A useful executive view is inappropriate for a BDM who should see only assigned accounts.

05

Approvals are detached from portfolio

High-capital exceptions need to sit beside existing commitments and recovery exposure.

06

Site profitability is reconstructed manually

Coffee volume, revenue, service cost and asset value can live in different reports.

The central risk

Commercial decisions become reactive when account economics, deployed capital, contract timing and salesperson responsibility are not visible together.

THE OPERATING MODEL

A connected workflow around the equipment record

Corexa keeps identity, evidence, operational state and the next decision connected so one workflow can carry context into the next.

1

Resolve role scope

Owner, wholesale manager, sales manager and BDM begin with the right data boundary.

2

Combine account economics

Bring coffee kg, revenue, service cost and margin context together.

3

Add equipment exposure

Show deployed/book/unrecovered capital and expected asset return.

4

Surface time-based risk

Highlight contracts ending, commitment shortfalls and future WAM capacity.

5

Connect approvals

Place commercial exceptions beside the portfolio context needed to decide them.

COREXA CAPABILITY	OPERATIONAL CHANGE	WHY IT MATTERS
Role-aware dashboards	The same commercial data is aggregated differently by authority.	Users see the portfolio they are responsible for, not a one-size-fits-all dashboard.
Capital exposure	Placed equipment value, book value and unrecovered capital are visible.	Revenue can be interpreted alongside the assets funding the relationship.
Coffee performance	Contracted vs actual kg and top-up exposure can be surfaced.	Commitment risk becomes visible before renewal.
Contract horizon	Ending agreements and expected equipment returns are listed.	Sales and WAM can plan renewals/redeployment earlier.
BDM/account profitability	Revenue and service-cost contribution can be viewed by rep and site.	Performance can be discussed with operating context.
Decision queue	Commercial exception approvals sit in the same management layer.	Approval decisions can reference current capital and contract exposure.

CREDIBILITY STANDARD

What is supported - and what is not yet claimed

The evidence boundary is explicit: product capability, live repository/production evidence and future outcome hypotheses are not treated as the same thing.

✓ Current dashboard implementation

Role-aware commercial/capital API and dashboard components are in the current repo.

✓ Live underlying schema

Account, agreement, placement, calculator and approval data structures are deployed.

✓ Scope enforcement

BDM data is constrained to permitted/assigned accounts while management roles

✓ Outcome measurement required

Decision quality, renewal timing and margin improvement require longitudinal

Not yet claimed: This study does not claim that displayed contribution equals audited accounting profit or that the dashboard alone improves sales performance. Commercial metrics depend on source completeness and the organisation's accounting definitions.

Measurement plan for the publishable version

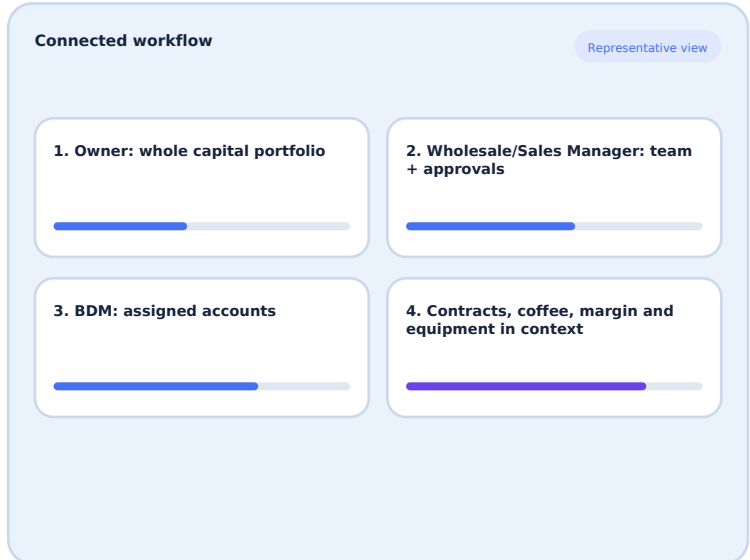
MEASURE	EVIDENCE SOURCE	CREDIBLE REPORTING
Capital recovery visibility	Placement economics	Share of live placements with complete deployed/recovered/unrecovered values.
Contract notice window	Agreement end dates	Average days of visibility before renewal/return decisions.
Commitment shortfall	Coffee actual vs contract	Accounts below agreed kg/spend by period.
Approval cycle time	Commercial decision queue	Time to approve/reject high-risk scenarios.
BDM portfolio coverage	Account assignment + economics	Assigned accounts with current commercial data.
Renewal/redeployment outcome	Agreements + placements	Contracts renewed or assets redeployed after early warning.

"A commercial dashboard should show not only what is being sold, but what capital is committed, what the customer promised and what becomes available"

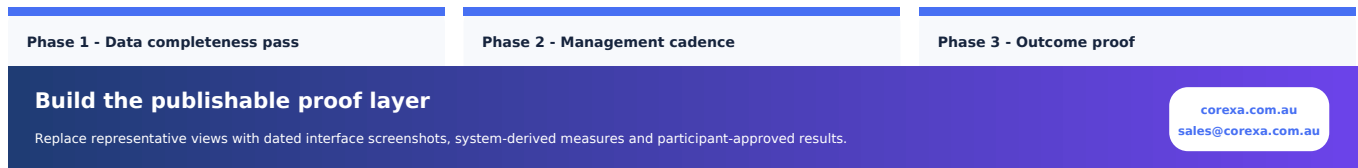
MAKE THE STORY TANGIBLE

Show the same portfolio changing by role without changing the truth

Use the live Corexa interface for publication, keep representative/demo content labelled, and show the exact state transition the workflow is meant to prove.



Recommended evidence-building sequence



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Publication note: capability descriptions are repository/production evidence. Confirm deployed workflow, permissions and data quality before presenting capability as a measured customer outcome.