

01 / DAYS 1-30 - DISCOVER & ALIGN

Define the outcome.

Establish the evidence.

Sample Operations Portal: improve the clarity of request approvals, regression feedback, and release responsibilities.

SAMPLE - proposed sequence only

This fictional roadmap is a discussion tool, not an EFO client result or fixed delivery promise. Day ranges illustrate sequencing. Actual scope, capacity, dates, and targets require agreement.

Goal for the first phase

Create a shared view of critical workflows, business rules, role responsibilities, and the current delivery process. Establish the information needed to choose a bounded implementation pilot.

Workstream	Proposed deliverable	Owner role
Product & quality	Critical journey map; approval-state examples; prioritized questions	Product owner + QA lead
Security readiness	Selected role matrix; review responsibilities; authorized assessment scope	Application + access owner
Delivery & operations	Current release map; environment assumptions; observation handoffs	Delivery/operations lead
Planning	Pilot scope; dependencies; acceptance criteria; effort assumptions	Technical lead

Dependencies and decisions

- Required inputs: appropriate stakeholder access, current requirements, a representative release history, and an authorized test environment.
- Agree who approves workflow rules, role boundaries, pilot scope, and release-readiness evidence.
- Record unresolved information and exclusions. Avoid assuming that missing evidence proves a defect or absent control.

Phase-one readiness gate

Proceed when selected journeys, owners, expected behavior, and permitted review activities are agreed. The pilot has a usable environment and test-data approach. If these prerequisites remain open, revise the plan before implementation.

Baseline status: not measured. Capture current manual checking effort, recurring failure causes, and waiting points as part of discovery; select useful measures with the people responsible for the workflow.

02 / DAYS 31-60 - BUILD THE PILOT

Improve one boundary. Build dependable feedback.

Implementation work follows the approved scope and evidence from phase one.

Goal for the second phase

Implement the selected workflow correction and a maintainable regression pilot. Connect checks and operational responsibilities to the delivery process without expanding beyond the team's capacity to maintain them.

Workstream	Proposed deliverable	Acceptance evidence
Workflow quality	Consistent approval-state rules at relevant boundaries	Agreed valid/invalid examples and reviewed results
Test automation	A small suite for selected intake, approval, and reporting journeys	Defined data setup, meaningful failures, and version-linked reports
Access readiness	Implementation or process updates for agreed role responsibilities	Authorized acceptance cases and owner-approved documentation
Delivery visibility	Repeatable checks and an observation checklist	Run results and a documented response handoff

Dependencies and operating controls

- Use the approved phase-one rules and authorized environment. Review changes with the relevant product, engineering, and access owners.
- Confirm how test state is created or restored. Document external dependencies and how a failed check will be investigated.
- Identify deployment approvals, an appropriate recovery approach, and the owner of each selected observation signal.

Proposed readiness measures

Track repeatability of selected checks, effort to understand failures, and completion of agreed acceptance evidence. No percentage or speed improvement is claimed. Baselines and useful thresholds are established with the real team.

Phase-two readiness gate

Move to wider validation when the pilot's checks produce understandable results, required workflow expectations are demonstrated, and maintenance and response owners accept the handover. Review unresolved findings before making a release decision.

If environment instability or unclear requirements prevent useful evidence, pause expansion and address those dependencies. Completing more scripts is not a substitute for establishing dependable feedback.

03 / DAYS 61-90 - VALIDATE & OPERATE

Review the results. Choose the next increment.

Use actual project evidence to decide whether to expand, adjust, or reconsider the pilot.

Goal for the third phase

Validate the agreed behavior, rehearse operating handoffs, and transfer the knowledge needed to maintain the implementation. Compare the pilot with its baseline and use the result to prioritize the next bounded improvement.

Measure	How to establish it	Decision it supports
Checking effort	Record time spent on the same agreed journeys before and after the pilot	Is recurring work reduced without losing useful evidence?
Feedback usefulness	Review recurring failure causes and investigation effort	Should the suite expand or its foundation improve first?
Delivery waiting	Compare waiting points for representative changes	Which handoff is the next constraint?
Readiness ownership	Review acceptance records and a hypothetical handoff exercise	Can the assigned owners operate and review the workflow?

Handover package

- Agreed scope and exclusions; workflow and role decisions; implementation notes; version-linked validation results.
- Test-data instructions, suite ownership, maintenance expectations, and a process for reviewing unreliable checks.
- Release-observation checklist, escalation responsibilities, unresolved risks, and the next prioritized backlog.

Phase-three decision gate

The product owner accepts the demonstrated behavior, technical owners accept the operating responsibilities, and remaining questions have explicit decisions or follow-up owners. Expansion requires useful evidence and available maintenance capacity, not a predetermined savings target.

Success is defined with the real team

All measures in this roadmap are proposed. No actual EFO customer data, savings, defect reduction, or security results are stated. Implementation, adoption, and ongoing operating effort belong in the final evaluation.

Next step: discuss a project-specific assessment and roadmap at efosolution.com/contact. The plan can combine engineering, QA, automation, security-readiness, and cloud/DevOps work around an agreed goal.