

What evidence is holding this deal back?

Help the Deal Desk establish whether the current deal is ready for an accountable review.

\$480,000
Illustrative annual deal value

4 records
CRM · quote · security · finance

40 cases
Project-owned test cases

The recurring work to test

People reconcile scattered approvals, discover missing records late, and repeat reviews when the quote changes. An “approved” flag does not tell them whether the approval covers this deal’s current scope and terms.

EVIDENCE CONDITION	RECORDED RESULT	NEXT RESPONSIBLE ROLE
Security review is missing	Unresolved	Security reviewer
Approval covers an old quote or wrong scope	Unresolved	Security reviewer
Finance approved a different amount	Unresolved	Finance approver
All records agree; discount is 28%	Commercial review	Deal Desk owner
Records agree and standard policy is met	Evidence ready	Accountable owner reviews

A repeatable decision, with its evidence

Read
Fresh source records.

Check
Deal, quote, scope and terms.

Explain
Retained facts and a saved brief.

Repeat
File event or schedule.

Download and inspect: a versioned pack, 40 test cases, 13 synthetic source scenarios, the source mapping, and a pilot measurement worksheet. Automated runs and saved briefs are available in a configured Desk/Runner.

Evidence-ready does not authorize signature. No external task is delivered. Local records are asserted; authenticity and approver authority are not established. This is a single-deal demonstration.

Pilot: can one Deal Desk reduce evidence-assembly time and avoidable rework?

Review three delayed deals, establish a baseline, and compare with existing CRM/contract workflows. Agree an owner and success measures before making an ROI claim.

Fictional data and thresholds; not OpenText policy or a live integration. OpenText's Salesforce content integration provides business context. Existing platforms already support approvals; added value must be validated.
judgmentpack.org/examples/deal-evidence-readiness/ · Pack v0.2.0 · JPS Core 0.2.0-draft · Apache-2.0