

Clearflow

SAMPLE REPORT — SYNTHETIC EXAMPLE DATA

Clearflow Audit — BrightLedger

How one scattered weekly workflow becomes signal, summary, and action.

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BrightLedger is not a real client. Every company, name and number in this report is invented to show exactly what a Clearflow Audit delivers.

1. The workflow today

BrightLedger is a B2B finance platform. Its five-person customer success team looks after roughly 140 accounts. Every week the team runs the same two-part ritual: work out which accounts need attention, then tell everyone about it. The information needed already exists — in HubSpot, Zendesk, a Metabase usage dashboard, Slack, and a renewal tracker in Google Sheets — but none of it is in one place, so the team rebuilds the picture by hand, every week.

#	Step	Actor	What happens	Failure mode
1	Pull usage numbers	CSM	Opens Metabase, exports last week's usage per account into a spreadsheet	Skipped in busy weeks; numbers go stale
2	Check ticket queue	CSM	Scans Zendesk for open and ageing tickets per key account	Ageing tickets on quiet accounts get missed
3	Re-read Slack threads	CSM	Searches account channels for anything the team flagged	Depends on memory of what to search for
4	Check renewal tracker	CS lead	Opens the Google Sheet, checks who is inside 90 days	Sheet updated manually; dates drift
5	Assemble account notes	Each CSM	Copies fragments from HubSpot notes and inbox into a doc	The fullest picture lives in someone's head
6	Decide who's at risk	CS lead	Reads the doc, judges risk from experience	Signals visible individually, never together
7	Write the Friday report	CS lead	Rewrites everything into a status update for leadership	≈ 3 hours, every Friday
8	Chase follow-ups	Each CSM	Actions agreed verbally; each CSM keeps their own list	Follow-ups depend on memory; some vanish
9	Repeat next week	Team	The doc is abandoned; next week starts from zero	No compounding memory of the account

Steps 1–5 are collection. Step 6 is the only judgment step. Steps 7–9 are re-description and memory. That shape — mostly collection, thin judgment, no memory — is the signature of a scattered workflow, and it is very fixable.

2. What it costs you

All figures below are estimates based on the intake description, and are labelled as such.

Time. Steps 1–5 cost each CSM an estimated 45–60 minutes per week (≈ 4–5 team-hours). The Friday report costs the CS lead a further ≈ 3 hours. Estimated total: 7–8 team-hours per week — roughly a full working day, every week, spent assembling a picture that expires in seven days.

Delay. Risk is assessed weekly, so a signal that appears on Monday can wait until Friday to be seen alongside the others. In the intake example, a champion departure, a 35% usage drop, and two ageing reporting tickets were each individually visible for weeks — but only combined into “this renewal is in danger” 62 days before the renewal date, later than anyone wanted.

What gets missed. Follow-ups agreed verbally have no owner of record. The team's own estimate: one or two agreed actions per month quietly don't happen, and nobody notices until a customer does.

3. The Clearflow version

The redesign keeps every judgment call with your team and removes the collection and re-description work around it. Signal → Summary → Action:

Signal — automated. Usage deltas from Metabase, ticket age and volume from Zendesk, renewal dates from the tracker, CRM activity from HubSpot, and flagged Slack messages are collected automatically on a schedule. Steps 1–4 disappear. (Classification: automate.)

Summary — AI-assisted, human-reviewed. Each account gets a short generated summary: what changed this week, why it matters, and a proposed risk status — red / amber / green — with the reasons stated plainly. A CSM reviews the statuses before anything is shared; the model proposes, a person decides. Steps 5 and 7 shrink from hours to minutes. (Classification: AI-assist + human-review.)

Action — human-owned, machine-remembered. Each flagged account carries one recommended next action and, where useful, a drafted follow-up sitting in review — never sent automatically. Agreed actions are logged with an owner and resurface if not done. Step 8 stops depending on memory. (Classification: human-review; the logging is automated.)

Why the review points stay human: risk calls, relationship judgment, and anything a customer will read are decisions, not chores. Clearflow's position is that automating those is how teams lose trust — a human stays in review at every step, by design, not as a limitation.

Step 6 — deciding who is genuinely at risk — remains exactly where it belongs: with your team, now looking at one screen instead of five tools.

4. Automation opportunities

Ranked by value against effort (S = days, M = 1–2 weeks, L = 2–4 weeks):

1. Weekly signal collection (usage, tickets, renewals, CRM activity) — removes steps 1–4 entirely. Effort: M. Depends on API access to Metabase, Zendesk and HubSpot; the renewal Sheet can be read as-is.
2. Friday report generation — the leadership update drafted from the reviewed account summaries; the CS lead edits rather than writes. Effort: S once opportunity 1 exists. Highest time-saving per unit of effort.
3. Risk radar summaries with proposed red/amber/green statuses and stated reasons. Effort: M. Depends on opportunity 1; needs a short calibration period against the CS lead's own judgment.
4. Follow-up logging and resurfacing — agreed actions get an owner and a nudge if idle. Effort: S. No dependencies; could ship first.
5. Draft follow-up emails for red-status accounts, waiting in review. Effort: S on top of opportunity 3. Never auto-sent.

Not recommended for automation: the risk decision itself, renewal negotiation, and any direct customer communication without review. These stay human on principle (see section 3).

5. Tool & path recommendation

Nothing in the current stack needs replacing. The recommended path connects what BrightLedger already uses:

- Existing tools — HubSpot, Zendesk, Metabase, Google Sheets and Slack remain the systems of record.
- Make (or n8n if self-hosting is preferred) as the connective layer running the scheduled collection and routing — chosen over custom code because the team has no dedicated engineer for maintenance, and over Zapier because multi-step, multi-source scenarios price and scale better on Make.
- One LLM step (Claude API) for the account summaries, status proposals and drafts — always writing into a review queue in Slack, never outward.
- Delivery into Slack and Google Docs, where the team already lives. No new tool to log into, no new habit to build.

The principle behind the choice: the cheapest reliable path that your team can see into and switch off. No platform migration, no per-seat SaaS addition.

6. Build estimate

Fixed-scope options, priced in the typical Clearflow range (£1,500–£5,000):

Option A — The Friday fix. Opportunities 1 + 2: automated signal collection and the drafted Friday report. Estimated £1,500–£2,200, delivered in \approx 2 weeks. Recovers an estimated 4–5 team-hours per week immediately.

Option B — The full radar. Opportunities 1–5: collection, radar summaries with proposed statuses, drafted follow-ups in review, and follow-up logging. Estimated £3,200–£4,500, delivered in \approx 4 weeks including calibration. Recovers an estimated 7–8 team-hours per week and removes the “signals visible to no one” failure mode.

Both options include documentation, handover, and defined human-review points. No retainer required; a light care arrangement is available afterwards if wanted, but the system is built to be owned by your team.

Doing nothing differently also has a price: at the estimates above, the current workflow costs roughly a working day per week — call it 45+ team-days a year — plus the occasional late renewal scramble, which is where the real money is.

7. Next step

Reply to book Option A or B — or take this map to whoever you like; it's yours either way.

A real Clearflow Audit is built from your intake answers and uses your numbers. This sample is synthetic from cover to footer — that's the honest way to show the deliverable before you pay for one.