Silvermarsh

Data & workflow foundations

From fragmented inputs to reviewable work

Connect a recurring decision to dependable data, clear definitions and a workflow people can operate.

Who this helps

Operating teams and professional services firms working across spreadsheets, business systems, documents and research.

The situation

Teams repeatedly assemble the same information. Reports use conflicting definitions. Research loses its source trail. A useful analysis depends on one person remembering how it was built.

How we approach it

Map one decision and the steps that feed it. Inspect authorized inputs, define the measures and preserve source links. Build the smallest useful integration or workflow, test exceptions and hand it over with clear ownership. Use AI only where outputs can be checked.

What you can take away

An input and definition map; a working pipeline, report or source-linked research workflow; validation and exception checks; operating instructions; and an agreed handover or support plan.

Your team's part

Provide a process owner, authorized sample inputs and a reviewer who understands the work. Explain access restrictions and acceptance criteria. Professional judgments and approvals remain with the responsible client team.

A bounded scope

Begin with one workflow and agreed systems. Define access, security, third-party costs, deliverable rights and support before expanding. Complex records may require a readiness review before a build is scoped.

A useful first step

Email Hobson with the decision or recurring task, the systems involved and what a useful output would help your team do.

Illustrative example | A source-linked review brief

A fictional professional services team prepares recurring briefs from documents and public research. Capture source references, separate extracted facts from analyst interpretation, and route uncertain items to a reviewer before the brief is used. A draft brief with source links, an open-question register and a review checklist. This is a proposed workflow, with no claimed time saving or client result.

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