InsightVector CONSULTING
Project delivery, controlled.

CLIENT GUIDE MAP

Project-to-Cash Operating System

A practical guide for connecting commercial intent, delivery evidence, client acceptance, billing readiness, cash, and renewal.

FOR	CEOs, controllers, commercial leaders, PMO leaders, project executives, and delivery owners
USE	Map one real engagement across all eight stages and expose the delays that sit between functions
OUTCOME	A controlled path from commitment through evidence, billing, outcome, and renewal

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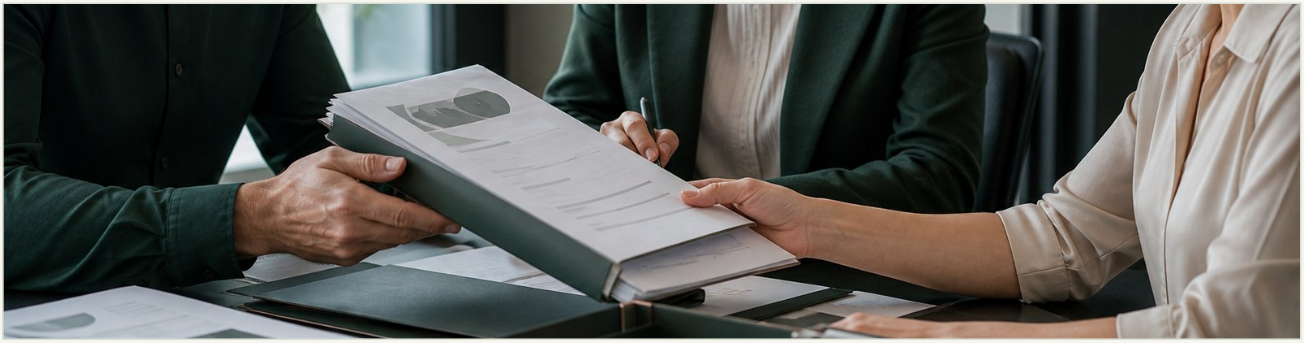
WHY THIS MATTERS

From Strong Delivery to Reliable Cash

Project-to-cash is not a finance-only process. What can be billed, defended, and collected depends on upstream commercial clarity, delivery discipline, change authority, and acceptance evidence.



Protect margin

Make scope, assumptions, change exposure, and remaining effort visible before they erode the commercial position.

Reduce handoff delay

Give each receiving owner a complete entry package so they can act without reconstructing the prior stage.

Accelerate billing

Connect contractual triggers to dated completion and acceptance evidence before invoice preparation begins.

Improve executive control

Use a small set of measures that reveal decision debt, evidence weakness, forecast variance, and cash conversion delay.

CLIENT PROMISE One engagement ID. Named owners. Dated decisions. Linked evidence. Financial reconciliation. The platform may vary; the control relationships should not.

How to use this guide

Select one representative engagement. At every handoff, name the sending owner, receiving owner, entry condition, exit evidence, decision authority, known exception, and escalation date. The gaps reveal where operating friction becomes margin or cash leakage.

LIFECYCLE MAP

One Control Path from Commitment to Cash

A handoff is controlled only when the receiving owner can act without reconstructing the prior stage.

1
QUALIFY
Fit and commercial intent
Exit: Pursuit decision and engagement ID

2
CONTRACT
Scope, terms, pricing, baseline
Exit: Executed obligations and change path

3
READY
Owner, plan, inputs, systems
Exit: Passed readiness gate

4
DELIVER
Progress, risk, cost, evidence
Exit: Controlled forecast and progress proof

5
CHANGE
Impact, approval, rebaseline
Exit: Authorized instruction and impacts

6
ACCEPT
Deliverable and client decision
Exit: Dated acceptance status

7
BILL
Trigger, invoice, collection
Exit: Reconciled invoice and payment path

8
CLOSE
Outcome, archive, renewal
Exit: Closed obligations and next decision

CONTROL SPINE Engagement ID | contract version | baseline version | deliverable ID | change ID | acceptance ID | billing event ID | decision ID

Map Profile

Engagement	Executive owner	Delivery owner	Finance owner
Contract type	Client approver	Start / end	Billing model

STAGES 1-2

Commit with Eyes Open

The first two stages convert a bounded opportunity into obligations the organization can deliver, support, and price with clear authority.

1. Qualify and commit

Entry: Qualified need, buyer authority, delivery model, and commercial assumptions.

Exit evidence: Approved pursuit, no-bid, or proposal decision; engagement identifier established.

Control question: Are delivery, finance, and risk assumptions visible before pricing is committed?

2. Contract and baseline

Entry: Approved proposal and negotiation position.

Exit evidence: Executed scope, terms, milestones, acceptance, billing, and change path mapped.

Control question: Can the team distinguish contractual obligation, operating plan, and optional work?

Stage	Minimum record set	Common breakdown	Client adoption move
Qualify	Qualification notes, assumptions, approval, source opportunity	Pricing happens before delivery and finance assumptions are challenged	Add a cross-functional pursuit gate for material engagements
Contract	Contract, SOW, amendments, deliverable register, baseline	Terms are signed but not translated into operating obligations	Run a contract-to-controls translation before kickoff

VALUE MOMENT Commercial control begins before delivery starts. The quality of the original assumptions determines how quickly later variance can be explained and defended.

STAGES 3-4

Start Ready. Deliver with Proof.

Readiness protects the organization from starting cost before ownership, inputs, systems, evidence, and billing setup are ready. Execution then measures progress through dated records rather than optimistic percentages.

3. Delivery readiness

Entry: Executed agreement and approved baseline.

Exit evidence: Named sponsor and manager; plan, team, access, evidence structure, and billing setup ready.

Control question: What must be true before work is authorized and cost begins?

4. Execute and control

Entry: Passed readiness gate and authorized work.

Exit evidence: Progress accepted internally; forecast and exceptions current; next commitment protected.

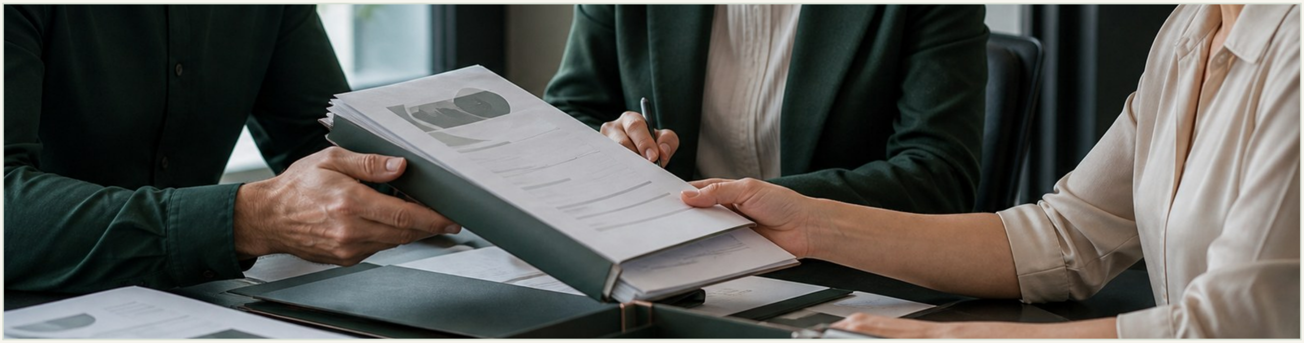
Control question: Does the forecast reconcile to actual work, remaining effort, and constraints?

Stage	Minimum record set	Watch signal
Ready	Readiness checklist, kickoff decisions, role matrix, system records	Projects begin with missing access, evidence structures, client decisions, or billing configuration
Deliver	Schedule, cost record, risk/issue log, deliverables, status pack	Reported progress cannot be reconciled to completed work, remaining effort, and acceptance criteria

STAGES 5-6

Control Change. Convert Completion into Acceptance.

Change and acceptance are the hinge between delivery effort and commercial value. Both require explicit status, authority, dated evidence, and a next action.



5. Change and rebaseline

Entry: Potential change, variance, client request, or discovered condition.

Exit evidence: Approved, rejected, deferred, or disputed instruction with all impacts recorded.

Control question: Is work proceeding beyond approved tolerance or without a billable instruction?

6. Accept and prove

Entry: Deliverable complete to defined quality criteria.

Exit evidence: Accepted, conditionally accepted, rejected, or pending with dated next action.

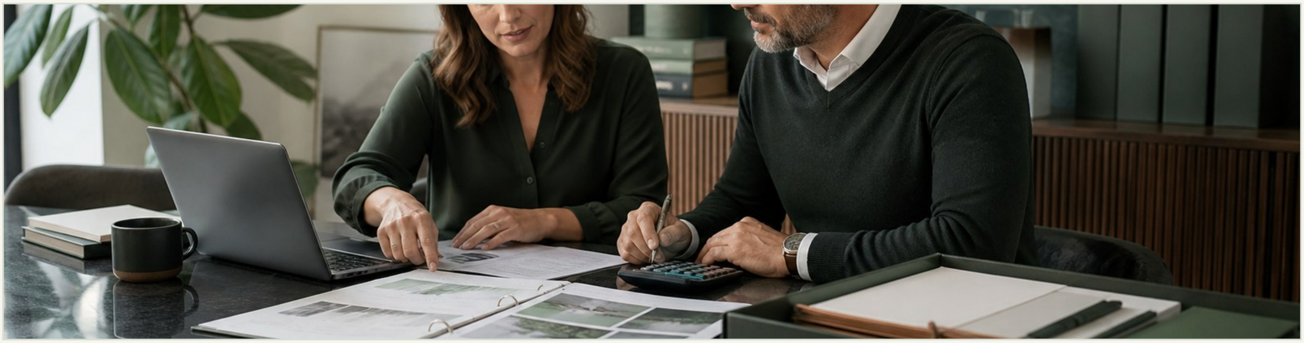
Control question: Can acceptance status be proven without searching email and meetings?

Stage	Minimum record set	Client adoption move
Change	Change request, estimate, approval, notice, updated baselines	Make unapproved schedule and value exposure visible in the weekly executive control forum
Accept	Submission, transmittal, review comments, approval/signature, evidence links	Define the acceptance state and required proof for every material deliverable before execution

STAGES 7-8

Turn Evidence into Cash, Outcomes, and Renewal

Billing should begin from a proven trigger and reconciled package. Closeout should confirm obligations, financials, learning, archive, and the next relationship decision.



7. Bill and collect

Entry: Billing trigger satisfied with required evidence and commercial status.

Exit evidence: Invoice issued, reconciled, accepted for processing, and tracked to payment.

Control question: What blocks invoice issue, client processing, or cash receipt today?

8. Close, learn, and renew

Entry: Delivery complete, acceptance resolved, and final billing path known.

Exit evidence: Closed obligations and finance; outcome review; approved archive and renewal/reference decision.

Control question: Is the engagement truly closed, or only no longer active?

Stage	Minimum record set	Client adoption move
Bill	Billing-readiness record, invoice, backup, dispute, payment record	Review invoice readiness before the scheduled invoice date, not after it
Close	Closeout, final reconciliation, lessons, outcome proof, renewal record	Require a joint delivery-finance close decision and capture the next relationship action

OPERATING FOUNDATION

The Minimum Data and Evidence Spine

Systems can vary. The identifiers, relationships, ownership, and evidence quality should not.

Control object	Minimum content	Why it matters
Engagement ID	Persistent across opportunity, project, change, invoice, and outcome records	No duplicate engagement identity
Contract version	Effective agreement, amendment, and commercial rules	Delivery and finance use the same terms
Baseline version	Approved scope, schedule, and cost effective date	Forecasts compare to a known reference
Deliverable ID	Owner, due date, criteria, status, and evidence	Completion is not a subjective percentage
Change ID	Cause, impact, authority, status, and affected baselines	Unapproved exposure remains visible
Acceptance ID	Submission, client decision, date, conditions, and evidence	Billing trigger can be proven
Billing event ID	Contract trigger, amount, evidence, invoice, and payment status	Delivery connects to cash without rekeying
Decision ID	Question, authority, options, due date, outcome, and actions	Decision debt is measurable

Evidence quality test

Current

The record reflects the latest authorized position.

Attributable

The owner, approver, sender, or system event is identifiable.

Dated and versioned

Timing and superseded states are preserved.

Linked

A user can move from the control record to supporting evidence and back.

Reconciled

Quantities, dates, status, and monetary values agree across responsible systems.

Actionable

The receiving owner can make the next decision without reconstructing the history.

DECISION RIGHTS

Assign Handoff Ownership

RACI is useful only when the receiving owner accepts the entry package and approval authority is unambiguous.

Stage	Accountable operator	Consulted	Evidence owner	Approver
1 Qualify	Commercial lead	Delivery + finance	Commercial analyst	Pursuit authority
2 Contract	Commercial / contract owner	Delivery + finance + legal	Contract owner	Authorized signatory
3 Ready	Project manager	Sponsor + finance + systems	PM / coordinator	Sponsor
4 Deliver	Project manager	Workstream + client leads	Control owners	Sponsor within tolerance
5 Change	PM / contract owner	Finance + delivery + client	Change owner	Contractual authority
6 Accept	Deliverable owner	Quality + client reviewer	Evidence owner	Client / contract approver
7 Bill	Finance owner	PM + contract owner	Billing owner	Finance authority
8 Close	Project manager	Finance + client + sponsor	Closeout owner	Sponsor / finance

Handoff Control Card

Sending owner	Receiving owner	Entry condition	Required by
Exit evidence	Decision authority	Known exception	Escalation date

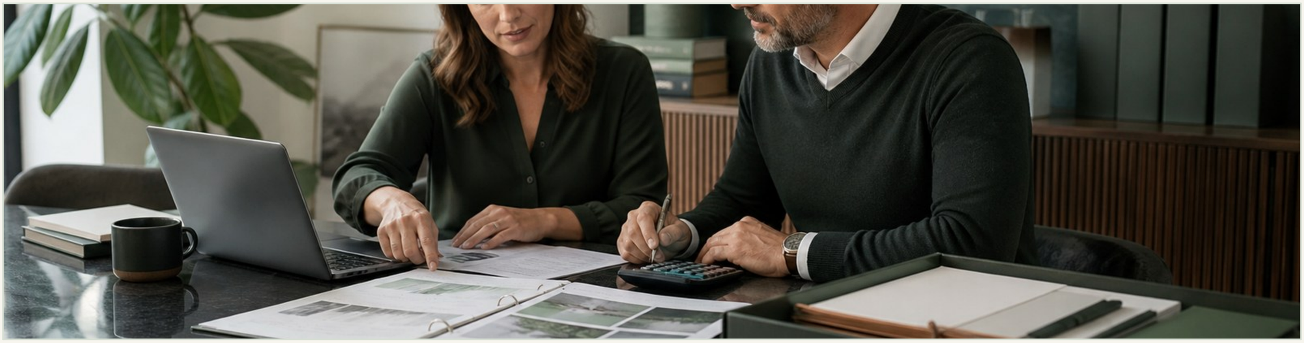
OPERATING RULE

The receiving owner must accept the handoff package. Silence is not acceptance, and a shared folder is not a complete control transfer.

EXECUTIVE CADENCE

Manage the Operating System

Choose a small set of measures that expose handoff delay, evidence weakness, forecast instability, and commercial leakage.



Measure	Control definition	Review
Readiness pass rate	Projects passing the readiness gate on first presentation / projects presented	Monthly
Decision aging	Open decisions past required date, by impact and authority	Weekly
Unapproved change exposure	Estimated schedule and value exposure for work without final authority	Weekly
Acceptance lag	Calendar days from deliverable completion to recorded client decision	Weekly / monthly
Billing-readiness lag	Calendar days from satisfied trigger to invoice-ready status	Weekly
Invoice issue lag	Calendar days from invoice-ready to invoice issued	Weekly
Cash conversion lag	Calendar days from invoice issue to payment received	Monthly
Evidence completeness	Required evidence present and linked / evidence required	Weekly
Forecast variance	Absolute variance between prior forecast and actual outcome, with explanation	Monthly

WORKSHOP

Run a 90-Minute Project-to-Cash Mapping Session

Use one live engagement, the people who own the handoffs, and the actual records. The purpose is to expose delay and ambiguity, not to perfect a future-state diagram.

Time	Activity	Decision / output
0-10	Frame the engagement, business outcome, billing model, and next commercial event	One engagement profile and workshop boundary
10-30	Walk stages 1-4: qualification through controlled delivery	Missing assumptions, readiness gaps, forecast evidence
30-50	Walk stages 5-8: change through close and renewal	Change, acceptance, billing, and closeout gaps
50-65	Trace one deliverable from contract term to billing event	End-to-end evidence chain and broken links
65-78	Assign sending owner, receiving owner, authority, and escalation	Named handoff control owners
78-90	Select three fixes and agree a 30-day adoption sprint	Prioritized actions, measures, and sponsor review date

Bring to the room

Commercial

Executed contract or SOW, active amendments, current change register, billing terms.

Delivery

Baseline, current schedule, deliverable register, risks/issues, latest status pack.

Evidence

One recent submission, review comments, acceptance record, and linked proof.

Finance

Budget, actuals, forecast, billing schedule, latest invoice status, open disputes.

FACILITATION PROMPT

At this handoff, what must the receiving owner know, trust, prove, and decide without searching email or rebuilding the story?

ADOPTION

A 30-Day Implementation Roadmap

Adoption works when the organization improves a real engagement while establishing the reusable controls. Keep the first implementation narrow, visible, and sponsor-backed.

Days	Focus	Actions	Evidence of adoption
1-5	Baseline the current path	Select pilot; map eight stages; identify handoff owners; trace one deliverable to cash	Current-state map, gap list, pilot measures
6-10	Define minimum controls	Approve identifiers, handoff card, acceptance states, billing-readiness rule, escalation	Control definitions and ownership matrix
11-20	Run the operating rhythm	Apply controls to live work; reconcile delivery, change, acceptance, and billing twice weekly	Complete evidence chain and aged exception list
21-25	Measure and correct	Review lags, pass rates, evidence completeness, and forecast variance	Three corrective actions with owners
26-30	Standardize and scale	Confirm sponsor decision; publish playbook; select next engagements; assign process owner	Approved standard and scale plan

Adoption guardrails

Pilot before platform

Prove the control relationships on one engagement before automating every step.

Minimum viable evidence

Require the smallest record set that can support the next decision and withstand review.

No shadow ownership

Every exception, decision, acceptance state, and billing blocker needs one named owner.

Executive pull

Use sponsor forums to remove decision debt and reinforce cross-functional accountability.

DIAGNOSTIC

Project-to-Cash Control Scorecard

Score each statement from 0 to 3 using one live engagement: 0 = absent, 1 = inconsistent, 2 = defined, 3 = reliable and evidenced.

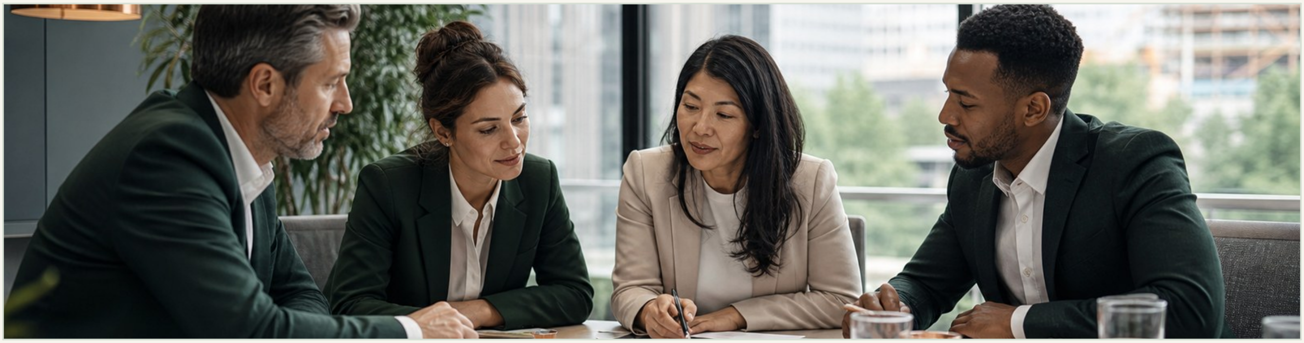
Control area	Diagnostic statement	0-3	Evidence / action
Qualify	Delivery, finance, risk, and commercial assumptions are visible before commitment.		
Contract	Executed terms are translated into deliverables, acceptance, billing, and change controls.		
Ready	Work starts only after ownership, access, systems, evidence, and billing setup are ready.		
Deliver	Progress and forecast reconcile to actual work, remaining effort, cost, risk, and proof.		
Change	All material variation has an explicit status, authority, impact, and work instruction.		
Accept	Every material deliverable has a dated acceptance state and accessible evidence.		
Bill	Satisfied triggers convert quickly into accurate invoices with complete backup.		
Close	Obligations and finance close together, outcomes are retained, and renewal is decided.		
Control spine	Identifiers, decisions, evidence, and financial records are linked and reconciled.		
Cadence	Forums produce timely decisions and measurable improvement in handoff performance.		

INTERPRETATION 0-10: fragmented control | 11-20: partially defined | 21-25: controlled with targeted gaps | 26-30: reliable and ready to scale. Use the score to prioritize the next operating decision, not as a maturity trophy.

CLIENT HANDOFF

Make the Next Operating Decision Visible

A project-to-cash improvement engagement should leave the client with a usable operating map, named ownership, practical controls, clear measures, and a path to scale.



Diagnostic review

Map one engagement, score the controls, trace one deliverable to cash, and identify the highest-value operating gaps.

Control design sprint

Define the minimum records, decision rights, evidence states, handoff cards, and executive measures.

Pilot implementation

Run the controls on live delivery for 30 days and use executive cadence to remove decision debt.

Scale and enablement

Standardize the playbook, align systems, train owners, and extend the operating model across the portfolio.

RECOMMENDED NEXT STEP

Map one real engagement with InsightVector. The diagnostic identifies where missing ownership, evidence, or system connections are delaying delivery, billing, cash, or executive decisions.

InsightVector helps project-based organizations govern delivery from commitment through evidence, billing, outcome, and renewal.

insightvectorconsulting.com

This guide is a management aid. Contract, legal, accounting, tax, safety, regulatory, and client-specific requirements should be reviewed by the appropriate professionals. Tailor the controls to each contract, operating environment, system landscape, and risk profile.