OVERSIGHT

Kingfisher Advisory

Summit Service Group

Independent Delivery Oversight

Acceptance plan for a partner-built billing handoff workflow

November 2026

Prepared for Summit Service Group

ILLUSTRATIVE SCENARIO | NOT A CLIENT ENGAGEMENT OR VERIFIED TEST

THE ADVISOR DOES NOT BUILD THE INTEGRATION

Executive oversight charter

APPROVAL RECOMMENDATION

Approve a short planning and feasibility review, not the full build. Before committing to implementation, require the delivery provider to prove the connection is supported, duplicate or failed jobs can be handled safely, staff approvals work, and the likely business benefit justifies the cost.

Summit Service Group has 45 employees across three locations. Staff currently copy completed-job information from ServiceTitan into QuickBooks Online, while Teams helps coordinate the work. An outside provider has proposed connecting the systems and possibly using AI to draft customer messages.

Commercial question	Kingfisher role	Delivery partner role
Which process needs improvement?	Define business goal, acceptance criteria and evidence required for a business decision.	Discover workflow, confirm supported interfaces and propose a technical design.
Who owns implementation?	Advise the sponsor, challenge vendor claims and observe agreed tests.	Build, configure, test, operate and document the solution under its own SOW.
Who signs off?	Provide independent recommendation, unresolved risks and decision record.	Supply passing test evidence and a support handoff; management accepts or rejects.

SEPARATE NEEDS FROM FEATURES

Scope and release boundaries

The first priority is getting each completed job into the billing process accurately and only once. AI-written customer messages are optional and should remain out of scope until the basic connection works reliably.

Boundary	Acceptance requirement	Responsible party
ServiceTitan event receipt	Provider confirms appropriate API/webhook access, event licensing, payload format and replay behavior.	Integration provider
Validation and deduplication	One durable event ID per business completion; invalid events rejected with an auditable reason.	Integration provider
QuickBooks handoff	Provider proves which **supported** QuickBooks API entity or approved accounting workflow will represent the handoff.	Integration provider + finance
Supervisor review	No invoice or external message is finalized outside documented approval authority.	Operations + finance
AI draft content	Use only approved job data; drafts stay human-reviewed and cannot independently send.	Operations + provider
Exception recovery	Every failed event has an assigned owner, alert, replay path and support escalation.	Provider + client operations

Critical integration feasibility assumption

DO NOT ASSUME AN API OBJECT

“QuickBooks billing task” is not a confirmed QuickBooks API feature in this example. Before Summit funds development, the provider must demonstrate the specific supported interface, licensing needs, required permissions and how errors will be handled.

TECHNICAL SPECIFICATION AS AN APPENDIX

Provider design requirements

The delivery provider must design and test the following fields and controls. They are requirements for the proposed integration, not features that Kingfisher has built or verified.

Data element	Requirement	Reason
event_id	Unique stable identifier across retries and replays.	Ensure one business effect per completion.
job_id and location_id	Required and checked against authorized source records.	Prevent crossing location and customer boundaries.
completed_at	Valid timestamp and source time zone.	Establish correct billing order and auditability.
billing_status	Enumerated approved states, separate from AI output.	Avoid hidden state changes from generated text.
source_version	Retained payload/schema version and correlation ID.	Support replay and post-incident investigation.
approved_by / approved_at	Required for designated billing or client-message actions.	Establish accountable human approval.

Security and reliability conditions

- Validate incoming event authenticity and authorization; verify source records independently where necessary.
- Do not treat AI-generated text as authoritative job, payment, or invoice data.
- Keep credentials least privileged, externally configurable and rotatable, and log attempts to access out-of-scope accounts.
- Use idempotent state transitions and reconcile provider retries against a durable business identifier.

INDEPENDENT HOLD POINTS

Project governance and decision gates

Gate	Evidence required from provider	Management decision
G0 Business scope	Approved process map, actual baseline, statement of work, ownership and security boundaries.	Sponsor approves bounded discovery.
G1 Interface feasibility	Live sandbox or equivalent sanctioned test verifying supported ServiceTitan and QuickBooks integration paths.	Sponsor approves build only if feasible.
G2 Controlled pilot	Validation, deduplication, negative-access tests, review and exception evidence; no unapproved sends.	Operations and finance authorize restricted use.
G3 Production release	Repeatable runbook, support handoff, rollback test, acceptance metrics and known issues.	Executive sponsor signs go / no-go.
G4 Value review	Measured time per completion and correction burden after launch, with operator feedback.	Continue, modify or stop investment.

Escalation ownership

- Kingfisher reviews the evidence, keeps track of decisions and advises the sponsor when a required check has not passed.
- The delivery provider is responsible for building, configuring, testing, fixing and supporting the integration under its contract.
- Summit sets business rules and approval limits, decides whether to proceed, and accepts any remaining risk.

MAKE FAILURE VISIBLE

Reliability and exception plan

Failure scenario	Required behavior	Acceptance evidence
Duplicate webhook event	Discard second effect while preserving trace and original outcome.	Replay same event twice; one handoff object.
Malformed or unauthorized data	Reject with reason; never bypass validation to finish a job.	Negative event suite, denied-access audit.
Third-party outage or timeout	Retry within policy; alert and quarantine after bounded attempts.	Fault injection and owned exception queue.
Supervisor rejects customer draft	Record rejection and block send, without mutating the source job.	Rejected-draft test, reviewer record.
Operator replays failed event	Replay through same idempotent path, not a privileged shortcut.	Re-run test with reconciliation evidence.

What the business should receive

Summit should be able to see which jobs were completed, which transfers failed, who is fixing them and how to retry safely. The provider should retain technical event IDs and recovery records so the team can trace each problem. A hidden error queue is not an acceptable handoff.

DO NOT SELL AI WHERE RULES SUFFICE

Value model and acceptance test

In this planning example, Summit completes 50 jobs per week and could save six minutes of re-entry per job. Across 52 weeks, that is 260 hours of potential staff capacity. At $35 an hour, the estimate is $9,100 annually before review, corrections, support and software costs. It is not a verified cash saving.

Measure	Baseline and method	Release or value criterion
Correct billing handoff	Sample completed jobs and reconciled records by location.	No unsupported or duplicate financial entry created by the interface.
Net staff minutes	Observe manual effort, corrections and exception handling.	Net improvement sustained after stabilization; not only gross automation time.
Customer communications	Review and approval records for any AI draft.	No external send without exact recipient and content approval.
Supportability	Operator tabletop and provider response test.	Named owner can stop, diagnose, replay and restore safely.
Accounting interface	Official API documentation and sandbox demonstration.	Finance verifies the specific supported transaction or work queue.

Value should be evaluated against the full cost of software, integrations, governance, maintenance and user review. Hours saved may create capacity without reducing expenditures.

RECOMMENDATION TO THE SPONSOR

Acceptance memorandum

CONDITIONAL GO

Proceed only when the provider demonstrates the supported accounting process, the controlled-pilot security tests pass, finance approves the way jobs reach billing, and operations has signed off on the recovery procedure. If any of these conditions are unmet, keep the release on hold.

Decision item	Evidence packet	Approval owner
Interface feasibility	Confirmed API capability, data flow, access model and tested object/action mapping.	Finance + IT
Security and control	Access matrix, approval/denial tests, retention and logging description.	IT + operations
Reliability	Duplicate/replay/fault-test results; stop/restore procedure; service-level support.	Operations lead
Business value	Measured baseline, pilot net time, total cost and explicit stop criteria.	Executive sponsor
Residual risk	Open issues, owner, due date and sponsor sign-off.	Executive sponsor