SE Process Consultation Flow

This document describes how an SE understands a customer process and translates it into a structured, executable Moxo flow.

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Key stages of a process consultation

- **Bold = Critical question**
- Not Bold = Secondary question, with valid default assumptions.

1. Goal

- **Key question: What process do you want to run?**

- Additional thinking from the SE:

  - Validation
    - Is this a good business process for Moxo?
  - Assumptions, unless clearly indicated otherwise:
    - It is not a recurring process.
  - Explanation to customer:
    - I'll help you design a reusable process template

2. Assignees

- **Key question: Who is involved in this process?**

  - Are any roles always assigned to the same person?
  - How is the right person for each role determined?
  - Can any role see every action?
  - Does any role act as a coordinator (manage/oversee the entire process)?

- Additional thinking from the SE:

  - Validation:
    - Are all roles representing people who need to take action in the flow?
  - Assumptions, unless clearly indicated otherwise:
    - All assignees are Contact TBD
  - Explanation to customer:
    - Assignees are defined as placeholders for who needs to participate in this process.

3. Kickoff / Trigger

- **Key Question: How does this process get started?**

  - Manual
  - From a kickoff form (if yes, what data is collected at the start?)

- From an automated trigger (if yes, what system & what data will be provided by the trigger)
- On a schedule

- Additional thinking from the SE:

  - Validation:
    - If kickoff is from an automated trigger, do we have a supported out of the box trigger for that application?
  - Explanation to customer:
    - The data provided at the start of the flow can be referenced by any steps.

4. Steps

- **Key Question: What happens in this process, step by step?**

  - Are these steps grouped into any key stages or milestones?
  - Do these steps happen sequentially? (*Implied yes, unless told otherwise*)
  - For each action:
    - Identify the action type
    - What should the action title be?
    - What should the action description be?
    - Who should the action be assigned to?
    - How long should this action take to complete / should we set a due date (e.g. due 5 days after starting)?
    - Should this action run in parallel to the previous step (*Implied no, unless told otherwise*)
    - Should this action be visible to anyone other than the assignee (*Implied no, unless told otherwise*)
  - For specific action types:
    - Forms / PDF Forms: Do you have an existing form or would you like to build it on Moxo from scratch?
    - Forms / File Requests: Do you require a reviewer to verify the submitted files before proceeding?
    - Acknowledgement: Would you like to force the user to open the document before acknowledging?
    - E-Sign: Do you have the document that needs to be signed? Or will it be prepared during the flow?
    - Decision: What happens if the decision is no?

- Additional thinking from the SE:

- Decision points, branches, loops are discovered naturally as the SE walks through the customer's real process and figures out the best mapping.

- Validation:
  - Can all steps be mapped into Moxo actions, controls, and automations?
- Assumptions:
  - All actions are sequential and visible only to the assignee.
  - No subflow, unless explicitly specified.
  - No milestones, unless explicitly specified.
- Explanations to customer:
  - Overview: We will map your process into a combination of human actions, system actions, controls, and AI automations. All actions have title, description, due date (optional), and assignees (one or more).
  - For each action, explain the specific nuances of that action: e.g. decision only supports single assignee, approval can have sequential or parallel assignees, decision can have up-to 3 paths, etc.

5. AI Automations

- **Key Question: Are there any tasks that you would like AI to try to automate to reduce manual work?**

  - For AI Automation & AI Prepare / Advise / Review:
    - What instructions would you like to provide the AI for its task?
    - What data should the AI use for its task?
    - What should the AI provide as its output response?
    - Do you have a role that the task should be escalated to if AI cannot do its job?

- Additional thinking from the SE:

  - The SE will do an additional proactive review for AI automation opportunities, specifically looking for AI data extraction or AI prepare/review/advise opportunities, even if the customer doesn't explicitly ask.

  - Validation:
    - Does Moxo support the required AI use case?
  - Assumptions:
    - Use the default Moxo AI model.
  - Explanations to customer:
    - The flow supports AI automation steps where AI can take action on its own, as well as assistance on human actions. AI can prepare a form

or e-sign action, leave an advisory note on any action, or review a form or file request action for accuracy.

6. System Integrations

- **Key Question: Are there any other systems that you would like to connect this flow with?**

- Additional thinking from the SE:

    - The SE will do an additional proactive review for automation opportunities that may not have been uncovered in the steps, even if the customer doesn't explicitly ask.
    - Validation:
        - Does Moxo support any integrations with the specified system?
    - Explanations to customer:
        - Your flow can easily integrate with your other systems via 1) Triggers (kick of a flow from another system), 2) Automations (send data back to another system), 3) Wait step (wait for some action to happen in another system), or 4) Pre-built integration actions (e.g complete a DocuSign, or do a KYC verification in Jumio).

7. Governance & experience

- **Key Question: How should we name each run of the flow, e.g. {Client Name} - Onboarding?**

- **Key Question: Who will be managing this process?**

    - Who is allowed to start this process?
    - Who is allowed to coordinate or manage active runs of this process?
    - Who is allowed to edit this flow design in the flow builder?

- Does this flow have an overall due date? (e.g should be completed within 30 days).
    - What should happen if the process becomes off-track from completing on time, or if the due date is missed? (future)

- Would you like to enable chat assistance for this process?

- What experience should assignees see?

- Additional thinking from the SE:

- The SE will walk the customer through the final setup to get the flow ready. The SE will confirm all these settings with the customer at least once. Flow name is required to reference a variable to avoid multiple flow runs with the same name. The SE will make a suggestion here.

- Assumptions:
    - Chat enabled, spotlight view enabled, there is no overall due date, a flow name using variables is set up, and auto-archiving enabled.
- Explanations to customer:
    - Brief explanation of difference between Execute, Coordinate, and Edit permissions.
    - Brief explanation of the chat experience in a flow
    - Brief explanation of Spotlight and Gallery view differences.

Default assumptions:

1. **Inferred defaults based on context (no need to ask, if inferred with confidence):**
   - All actions:
     - Action title
     - Action description
     - Action assignee
   - All automations:
     - Automation content
     - Inputs and outputs

2. **Foundational defaults (no need to ask, unless the user explicitly mentions):**
   - Assignees:
     - Contact TBD, no advanced settings enabled
   - All Steps:
     - No subflows
     - No milestones
     - Sequential execution order
     - No advanced step settings (skip sequential, visible to all assignees off)
     - Default step level due setting
     - Single assignee and reviewer
     - No branching
     - No loops
     - For decisions: some default for "No" path.
     - One completion path
   - AI Automation:
     - Default Moxo AI model
   - Flow Settings:
     - Automatic archival after completion
     - Default flow cover image
     - Chat assistance enabled

Defaults - category	Owned by	Copilot behavior
Core platform	Backend	Assume, never mention
Foundational default	Copilot policy	Apply unless overridden
Inferred default	LLM	Draft + review