01 / FINDING AND RECOMMENDATION

From a sent quote to a clear next action.

A complete example of the reasoning, action register and operating instructions in a bounded Workflow Review.

Sample scope: One fictional contractor office, one estimate-reply workflow and five invented examples. All names, dates, source extracts and findings are fictional. This demonstrates the format; it is not a customer case study.

The process problem in this example

The office tracks whether a quote was sent, but a customer reply can change what should happen next. A request for another option, an outdated approval and a stop request need different handling. Sending more reminders does not resolve those decisions.

Recommended first change

Use one action queue in the office's existing approved tool. Pair the current quote and source message with a named owner, next action, due time and contact rule. Check the tool's included reply, task and suppression features before buying another system.

The proposed handoff

1. Office checks the source

Match the latest reply to the correct estimate and version.

2. Office chooses the action

Route a requested answer, stop contact, or hold an unresolved case.

3. Named owner completes the work

Answer the question or resolve the hold within the agreed process.

4. Office records the next state

Update the source reference, owner and next review; do not assume a sale.

Not established: actual weekly volume, hours saved, conversion change or financial return. A real engagement would measure those separately. This sample sends no messages and configures no live system.

02 / SOURCE-TO-ACTION REGISTER

Five cases. Five explicit decisions.

Fictional snapshot: November 16, 2026. Internal due times below are examples, not promised customer appointments. Office names are invented.

F101 / REQUESTED CALLBACK

S1: Current quote v1; customer asks, "Please call Tuesday afternoon." The fictional record confirms that channel and purpose.

Owner: Jamie, office lead **Due:** Nov 17, 2 p.m.

Next action: Assign the requested callback; confirm the current quote before calling.

Rule: Follow only the requested purpose and approved contact rules; do not add a marketing sequence.

F102 / UNANSWERED OPTION QUESTION

S2: Customer asks, "Could you price the tankless option?" Existing quote is v1; no revised option is approved.

Owner: Drew, estimator **Due:** Nov 17, noon

Next action: Prepare the requested option and route it for the required approval.

Rule: Pause generic quote reminders while the question is unresolved; do not invent pricing.

F103 / STOP REQUEST

S3: Customer writes, "Please stop contacting me." No narrower channel or purpose is stated in the fictional request.

Owner: Casey, office backup **Due:** Immediately on receipt

Next action: Apply the stop across the relevant outreach tools and record the source.

Rule: No further outreach. Check that a second queue cannot send another reminder.

F104 / CONFLICTING VERSION

S4: Reply says, "Looks good," against v1. An internal note references a different v2 scope with no clear approval.

Owner: Drew, estimator **Due:** Nov 17, noon

Next action: Resolve which scope the customer means through the permitted clarification process.

Rule: Hold sold-job/crew release; do not treat an ambiguous reply as approval of v2.

F105 / MISSING SOURCE

S5: Imported row says "approved?" There is no underlying message, confirmed current quote or contact-permission record.

Owner: Jamie, office lead **Due:** Nov 17, noon

Next action: Find the original record and reconcile the missing fields internally.

Rule: Hold contact and job release. Missing evidence stays unknown; do not fill it in by inference.

03 / HANDOVER AND ACCEPTANCE

A process the office can use.

Daily operating instructions

Office lead: Review new replies and overdue actions at the agreed times. Work from the original message and current quote, not a summary alone.

Action owner: Record completion or the exact unresolved question. A handoff is open until the next person acknowledges responsibility.

Backup: Cover an absent owner explicitly. Stop requests and missing evidence do not disappear when a person is away.

Before any contact: Recheck current reply/stop status and the permitted channel and purpose. The most recent relevant instruction controls.

What a buyer would check at the walkthrough

[ ] F101: Can the intended user find the current quote, owner and requested callback without being told the answer?

[ ] F102: Does the unanswered question reach the estimator while generic reminders stay paused?

[ ] F103: Does the stop remain effective across every included outreach queue?

[ ] F104: Does the conflicting version stay on hold instead of becoming a crew instruction?

[ ] F105: Does the unknown source remain visible, with a person assigned to resolve it?

Acceptance status: not applicable - fictional sample. In a real engagement, record the actual reviewer, delivered version, acceptance date and any correction request. Silence is not acceptance.

Deciding whether paid help is worthwhile

First count the recurring cases and the time spent checking them. Compare the proposed work with the native feature or process change your team could use. Separate released staff capacity from actual cash savings. Do not attribute all later jobs to a new workflow.

The $950 Workflow Review: one workflow/location, up to five agreed redacted examples, a process map, editable action sheet, recommendation, walkthrough and one correction round. Implementation is separate and can be scoped directly when the problem is already clear. Dates, applicable tax and complete terms are confirmed in writing.

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