



YOUR TEAM PLAYBOOK

New client inquiry

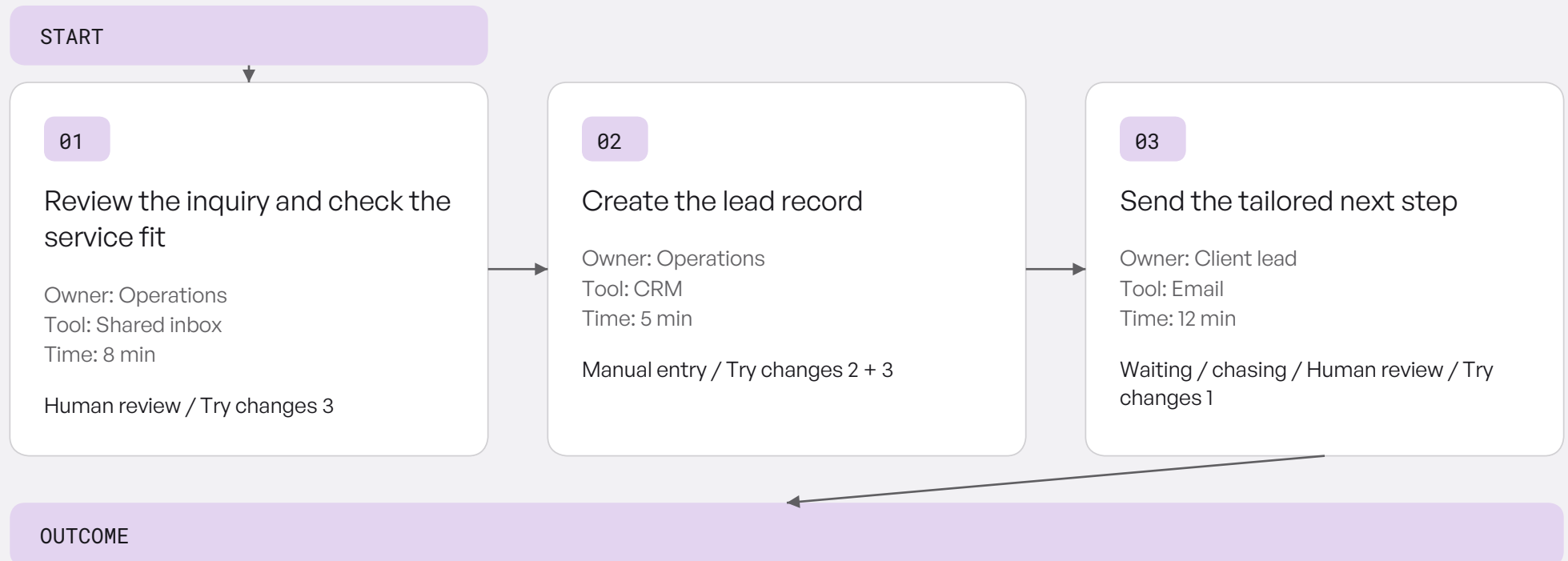
STARTS WHEN

A prospect submits the contact form.

DONE WHEN

The client has a clear next step and the team has a qualified record.

CURRENT PROCESS





FIRST FOCUS

Step 3: Keep a person here. First change to test: Reduce waiting and chasing.

WHAT THIS SUGGESTS

One handoff and one manual step make the move from Operations to Client lead after step 2 a place to check for delay. A handoff alone does not show that work is delayed.

01 · Keep a person here: Keep the reviewer responsible for the final call; any tool can prepare information, not make the decision.

02 · Candidate for a rule or automation: Check whether the same details already exist, then test a direct transfer or simple rule with the owner.

03 · Keep a person here: Keep the reviewer responsible for the final call; any tool can prepare information, not make the decision.

SUGGESTED CHANGES TO TRY

1 Steps 3 · Reduce waiting and chasing

Evidence: You marked this step as waiting or chasing.

Try: Agree who responds, what they need and when to follow up. Try one shared request with those details instead of separate reminders. Keep any required approval.

Check: For a few comparable requests, record arrival and response times and how many reminders were needed. Compare before and after; check that the outcome is still correct.

2 Steps 2 · Reduce repeat entry safely

Evidence: This step is marked as manual entry.

Try: If the same details already exist, reuse that record or test a direct transfer instead of typing them again. Keep a person checking the result.

Check: Compare real-run errors and entered minutes before and after the test. Do not treat one run as proof.



3 Steps 1 + 2 · Make the handoff clear

Evidence: Between these steps, the tool changes.

Try: Agree what must be ready before the next person or tool takes over.

Check: Walk through one handoff and check the next step starts with what it needs.

TEST WITH YOUR TEAM

1. Choose one suggested change with the person doing that step. Write down what a good result looks like.
2. Before changing it, record the time, reminders and corrections for a few similar real requests.
3. Try the change on a small set of comparable requests. Keep the same human checks.
4. Compare results. Keep the change only if it helps without reducing quality; otherwise adjust it or return to the old process.

3 steps

25 min entered

1 work move

Time covers 3 of 3 steps. “Work moves” means the task passes from one person to another.

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