

One-workflow automation brief

SMALL BUSINESS / Example: organize inbound customer inquiries

Situation

An illustrative service business receives new inquiries in a shared inbox and manually updates a customer list. This is a planning example, not a completed client project.

Objective

Create a reliable intake and review workflow while a person remains responsible for customer replies. Validate the workflow with representative test data before live use.

Proposed scope

- Capture only agreed intake fields and attach a source reference.
- Check for duplicates and missing information before creating a record.
- Suggest an inquiry category and next action for staff review.
- Send failed or uncertain items to a named exception owner.

Not included in this example: autonomous outbound sales, payment processing, sensitive health data, or replacing a customer-management system.

Evidence to review

Measure	How to evaluate it
Handling time	Measure staff effort per comparable request before and during the pilot.
Follow-through	Review whether each accepted request has an owner and next action.
Rework	Count duplicates, incomplete records, routing errors, and corrections.

Decision gate

The workflow owner reviews routine, duplicate, incomplete, and failed-request tests. Start a limited live pilot only after the agreed acceptance checks pass.

Pilot test and ownership worksheet

Use this worksheet to shape the conversation. Owners, thresholds, dates, and approvals are set for the actual engagement.

Review and test structure

Review item	Required evidence or expected behavior
Routine inquiry	Expected fields recorded; assigned owner checks the suggested next action.
Duplicate inquiry	Duplicate is flagged; a second customer record is not silently created.
Incomplete inquiry	Missing fields are visible and routed for review.
Integration failure	The request remains recoverable; a named owner sees the exception.

Ownership to confirm

Role	Example responsibility
Client workflow owner	Approves fields, categories, test cases, and the pilot decision.
Implementation owner	Configures the agreed workflow and records test evidence.
Exception owner	Reviews failed or uncertain items and confirms recovery.

Decision record

Record: baseline period / pilot period / evidence location / unresolved items / owner approval / proceed, revise, or stop.

Open questions / next actions