BUSINESS ASSESSMENT & ACTION PLAN

From inquiry to client handoff.

A fictional service-business example. Recommendations based on the scenario below; no client results are represented.

The business goal

Give every new inquiry a clear next step and every accepted client a consistent start.

What needs attention

In this scenario, inquiries arrive in several inboxes. Follow-up depends on memory, and intake details are collected again after the sale.

Three priorities

01 **Assign an owner to each inquiry.**
Use one shared record for the next action and due date.

02 **Standardize the first follow-up.**
Agree on response timing and the next-step message.

03 **Create one onboarding handoff.**
Collect agreed intake details before delivery begins.



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RECOMMENDED PROCESS

A clear owner.
A clear next step.

A proposed workflow to validate with the team before selecting or configuring tools.

01
Inquiry received
Record owner + next action

02
Conversation & fit
Confirm need + next step

03
Scope agreed
Agree deliverables + terms

04
Client onboarding
Collect intake + hand over

Before implementation

Review a sample of recent inquiries, confirm who owns each stage, and check the tools already in use. Agree a separate implementation scope before making changes.

How progress will be reviewed

Establish current response times and handoff completeness. Agree targets with the business, then review a sample of records after the new process is in use.

Assessment and recommendations do not authorize implementation. Any build or ongoing support requires a separately agreed scope and fee.



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