

01 SOURCE INVENTORY

Know exactly what can start the workflow

List every inbound source before connecting automation. Preserve the source event, identity evidence, and a real owner.

Start with one appointment type

A discovery call, estimate visit, venue tour, and design consultation need different fields, owners, durations, and rules.

WORKFLOW NAME

SOURCE	TRIGGER / EVENT	STABLE ID	EVIDENCE RETAINED	OWNER

SOURCE INTEGRITY CHECK

☐ Raw inquiry retained

☐ Event ID retained

☐ Disclosure/version retained

☐ Named owner exists

SOURCE OR OWNERSHIP GAP TO FIX FIRST

02 RECORD DESIGN

Create one lead record the workflow can trust

Conversation memory is not the source of truth. Define stable identity, evidence, current state, ownership, and stop behavior.

REQUIRED RECORD FIELDS

- ☐ Source event + received time
- ☐ Original inquiry
- ☐ Stable identity keys
- ☐ Seller + purpose + channel
- ☐ Permission evidence
- ☐ Current state + version
- ☐ Current owner
- ☐ Appointment + suppression

NEVER INFER AS FACT

- ☐ Contact permission
- ☐ Budget or authority
- ☐ Service eligibility
- ☐ Existing appointment
- ☐ Human ownership
- ☐ Tool success
- ☐ Booking completion
- ☐ Opt-out scope

PRIMARY IDENTITY KEY

Example: CRM contact ID

SOURCE EVENT ID

Example: provider submission ID

DUPLICATE RULE

What proves repeat event vs new opportunity?

AMBIGUOUS IDENTITY RULE

When must a person review instead of merging?

CURRENT-STATE VERSION RULE

How does a delayed job prove it is still current?

DESIGN TEST

Can a reviewer reconstruct why this lead is in this state without asking the model?

03 SLOT CANVAS

Design the complete inquiry-to-appointment loop

Write the evidence, decision, action, and proof for one workflow. Keep unknown facts unknown and every delayed action state-aware.

S**Save trustworthy state**

What record and evidence must exist before contact?

L**Learn the one missing fact**

Which single unknown materially changes the route?

O**Offer the next valid move**

What answer, question, option, route, or close can happen now?

T**Track the verified outcome**

Which calendar, record, owner, confirmation, and stop evidence proves completion?

LOOP RULE

Save once at intake. Learn and Offer may repeat. Track closes only with evidence.

04 MESSAGE CONTROL

Write the objective before the copy

Every message needs current inputs, a send gate, stop conditions, and a clear next action. Avoid universal touch counts.

FIRST USEFUL RESPONSE

OBJECTIVE

REQUIRED INPUTS

SEND GATE

STOP CONDITIONS

EDITABLE COPY

ONE MISSING FACT

OBJECTIVE

REQUIRED INPUTS

SEND GATE

STOP CONDITIONS

EDITABLE COPY

APPOINTMENT OFFER OR HANDOFF

OBJECTIVE

REQUIRED INPUTS

SEND GATE

STOP CONDITIONS

EDITABLE COPY

Never send from a timer alone. Reload current state immediately before execution.

05 LAUNCH TESTS

Break the workflow before customers do

Run every case more than once. Inspect the final calendar, CRM, pending-action queue, provider state, and owner acceptance.

CASE	PASS	HOLD	EVIDENCE / REPAIR NOTE
01 Duplicate form submission	☐	☐	
02 Reply during scheduled delay	☐	☐	
03 Appointment booked elsewhere	☐	☐	
04 Plain-language stop request	☐	☐	
05 Wrong person or invalid destination	☐	☐	
06 Existing customer issue	☐	☐	
07 Outside service area	☐	☐	
08 Unsupported request	☐	☐	
09 Calendar slot disappears	☐	☐	
10 Ambiguous calendar timeout	☐	☐	
11 CRM fails after calendar succeeds	☐	☐	
12 Owner never accepts handoff	☐	☐	

RELEASE GATE

06 30-DAY REVIEW

Measure verified outcomes, not message volume

Compare like-for-like sources and appointment types. Record capacity, staffing, and campaign changes before drawing conclusions.

METRIC	BASELINE	PILOT	COUNT / NOTE
P50 first useful response			
P90 first useful response			
Reply rate			
Qualification rate			
Booked / eligible inquiry			
Workflow completion rate			
Unplanned intervention rate			
Cost / booked appointment			

REVIEW DECISION

☐ Expand narrowly

☐ Hold and repair

☐ Roll back

WHAT IMPROVED, WITH WHICH DENOMINATOR?

WHAT FAILED OR REQUIRED HUMAN RECOVERY?

NEXT REVIEW DATE

OWNER