One workflow.
A clear next step.

FICTIONAL SAMPLE - not a customer case, quotation or completed customer audit. No results or savings have been measured.

1. Task and scope

A small service firm receives enquiries with missing information. The review begins with the customer message and ends when a person can choose the next step. Pricing, professional judgment and a final appointment are outside this scope.

2. Process map

1 Message	2 Ask for details	3 Approved source	4 Staff review	5 Next step

This map performs no actions. A preferred time is not a booking, and AI text is not evidence of a saved appointment.

3. Sources, information and owner

Approved source: the business service description with date and responsible owner. Needed information: name, contact route, task type, area and preferred time. Sources are updated when services, prices or hours change.

A supplied email address does not establish access to another customer's history. No passwords, payment cards or sensitive customer files are needed in this example.

4. Unknown facts and exceptions

Unknown prices, uncertain service areas, conflicting sources and professional questions go to a person. Failures show an honest status. An owner must be able to pause the process. Automated customer contact needs its own agreement and checks.

Tests, measurement and decision

Proposed test criteria. Not completed customer tests.

5. Bounded test with fictional messages

1. Complete enquiry: collect information once and identify the next owner.
2. Missing area or contact: ask rather than guess.
3. Unknown price or time: no binding price or booking confirmation.
4. Human-help request: show and test the correct handover.
5. Duplicate or connection failure: no duplicate record or false success.
6. Stale source: stop the affected action, correct and retest.

6. Measurement sheet - use actual observations

Measure	Before	After
Period and relevant enquiry count		
Median time to human follow-up		
Missing-information rate		
Staff effort, corrections and failed handovers		

Fields are blank: no customer measurement exists. Compare the same task types and disclose changes in volume or staffing. Released capacity is not automatically a cash saving.

7. Sample recommendation

Define a manual contact process and owner first. Test the approved sources. Then decide whether a simple form is enough or a bounded pilot should be agreed. Integrations, implementation, operation, fee and delivery are scoped separately.

Read the sample and describe a task: procora.ai/en/ai-consulting/sample