

KASENCE FLOW INSIGHTS | EPISODE 01

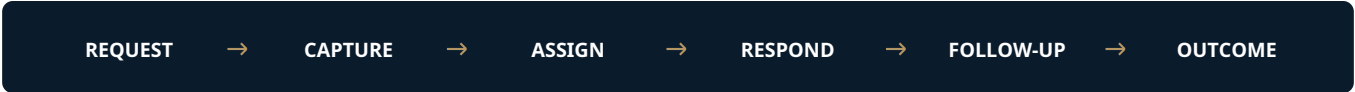
Fix the Flow First

Human Service. Smarter Systems.

Before adding another app, automation, or reminder, make sure the work itself has a clear path. Use this worksheet to trace one real customer request from the moment it arrives to the final outcome.

WATCH EPISODE 1 Small Business Automation: Fix the Flow Before You Automate

THE BASIC FLOW



CUSTOMER CARE | BUSINESS FLOW | CONNECTED SYSTEMS

THE KASENCE FLOW CHECK

Answer these five questions for one real business process.

PROMPT	YOUR NOTES
<div>1</div> What starts the process? Be specific: a call, web form, email, text, estimate request, appointment, payment, or another trigger.	<div></div> <div></div> <div></div>
<div>2</div> Who owns the next step? Name the role or person responsible. If the answer is 'whoever sees it,' ownership is unclear.	<div></div> <div></div> <div></div>
<div>3</div> Where does the information live? Identify the system of record: CRM, inbox, spreadsheet, scheduling tool, paper note, or somewhere else.	<div></div> <div></div> <div></div>
<div>4</div> What happens if someone does not take the next step? Look for reminders, escalation, reassignment, or a visible exception path.	<div></div> <div></div> <div></div>
<div>5</div> Can you see the status without asking an employee? A healthy process should show what is open, waiting, completed, or stuck.	<div></div> <div></div> <div></div>

NEXT: MAP WHAT ACTUALLY HAPPENS TODAY.

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MAP ONE REAL PROCESS

Choose one process that creates delay, confusion, inconsistent follow-up, or unnecessary coordination.

PROCESS / CUSTOMER REQUEST		
1 TRIGGER	2 CAPTURED WHERE?	3 OWNER
4 ACTION	5 FOLLOW-UP	6 OUTCOME

WHERE DOES THE FLOW BREAK?

Mark the kind of friction you see most clearly.

- ☐ Response
- ☐ Ownership
- ☐ Follow-Up
- ☐ Handoff
- ☐ System Visibility
- ☐ Admin Friction

WHAT IS HAPPENING TODAY?

Describe the current process, including workarounds or manual coordination.

WHAT SHOULD HAPPEN INSTEAD?

Describe the desired next step, owner, system, and exception path.

THE FIRST CHANGE I WOULD MAKE

Choose one improvement that reduces friction before adding more technology.

READY FOR A SECOND SET OF EYES?
Take the Kasence Flow Check at kasence.com/contact