

Next Step Clarity

Human Service. Smarter Systems.

Next Step Clarity Worksheet

A customer saying yes should start a clear process - not a new period of uncertainty. Use these five questions to examine what happens immediately after commitment.

THE CORE FLOW



THE KASENCE FLOW CHECK

PROMPT	YOUR NOTES
1 When a customer agrees to move forward, what exactly happens immediately afterward?	
2 Who owns the customer's next step, and is that ownership visible to the people who need to know?	
3 Before the interaction ends, does the customer know what happens next, who will contact them, when they should expect it, and whether they need to do anything?	
4 If the expected next action does not happen on time, is there a clear backup or escalation process before the customer has to ask?	
5 Can your business easily see which customers have said yes but are still waiting for their next meaningful step?	

REMEMBER

The customer said yes. Your process still owes them a clear next step.

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TRACE ONE CUSTOMER AFTER "YES"

Choose one recent customer and trace what happened from the moment they committed through the first meaningful next milestone.

CUSTOMER / REQUEST Who or what are you tracing?		
WHAT COUNTED AS "YES"? Approved estimate, booked, signed, paid, verbal approval, etc.		
IMMEDIATE CONFIRMATION What did the customer receive or hear right away?		
NEXT-STEP OWNER	EXPECTED TIMING	
EXPECTED NEXT ACTION What should happen next?		
CUSTOMER RESPONSIBILITY What does the customer need to sign, pay, send, prepare, or do?		
HOW STATUS IS VISIBLE Where can the business see that the customer is waiting or progressing?		
BACKUP / ESCALATION What happens if the expected next action does not occur?		
CURRENT-STATE FLOW	DESIRED-STATE FLOW	
COMMUNICATION GAP	OWNERSHIP GAP	SYSTEM GAP
FIRST IMPROVEMENT TO MAKE What single change would make this transition clearer or more reliable?		

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