

KASENCE FLOW INSIGHTS | EPISODE 01

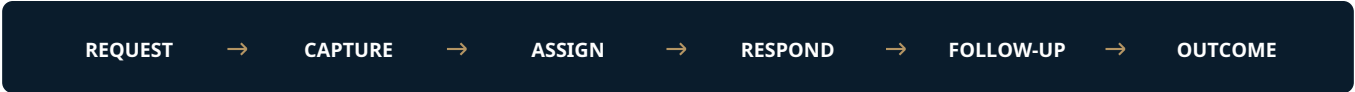
Fix the Flow First

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.

Fix the Flow First

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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

Missed Call Response Checklist

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What happens after the phone rings?

A missed call is not automatically a lost customer. The risk appears when there is no clear process for capturing the request, assigning ownership, responding, following up, and recording the outcome.

A MISSED CALL WITHOUT A RESPONSE PROCESS IS THE REAL RISK.
Treat the missed call as the start of a workflow - not the end of a phone call.

A BETTER MISSED-CALL FLOW

CALL → CAPTURE → ACKNOWLEDGE → ASSIGN → RESPOND → FOLLOW-UP → OUTCOME

KASENCE FLOW CHECK

Review your current missed-call process. Check each question you can answer clearly.

PROMPT	YOUR NOTES
1 Where does a missed call go?	Clear
2 Who owns the first response?	Clear
3 How quickly should that response happen?	Clear
4 What happens if the assigned person doesn't respond?	Clear
5 Can you see which missed calls are still unresolved?	Clear

IF ONE OF THESE ANSWERS IS UNCLEAR:
The issue may not be the phone system. It may be the flow around it.

Missed Call Response Checklist

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BUILD YOUR RESPONSE STANDARD

MAKE THE NEXT STEP CLEAR BEFORE YOU ADD MORE TECHNOLOGY

Use this page to define who responds, how quickly they respond, and what happens when the normal path breaks. The goal is not complexity. The goal is visible ownership.

TARGET RESPONSE TIME

Example: within 15 minutes, same business hour, next morning

PRIMARY OWNER

Who is responsible for the first response?

BACKUP OWNER

Who takes over if the primary owner is unavailable?

ESCALATION TRIGGER

When does an unresolved call need attention from someone else?

CURRENT STATE VS. DESIRED STATE

Describe what actually happens today, then define the process you want to be able to rely on.

WHAT HAPPENS TODAY?

WHAT SHOULD HAPPEN?

THE FIRST GAP WE NEED TO FIX

Choose one specific break point - ownership, response time, escalation, follow-up, or visibility.

NEED HELP IDENTIFYING THE GAPS?

Take the Kasence Flow Check and start with the flow before adding more tools.

kasence.com/contact

Kasence First Contact & Ownership Worksheet

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Episode 03 Companion Resource

Use this worksheet after watching Kasence Flow Insights 03 to map what happens after a customer first contacts your business. The goal is to identify who owns the next step, where requests can stall, and what needs to change to create a more reliable customer process.

CORE FLOW



PART 1 - FIRST CONTACT SNAPSHOT

Business name

Most common first-contact source
(phone, website form, email, text, social, referral, other)

Primary service or request type being evaluated

Date

PART 2 - THE EPISODE 3 FLOW CHECK

PROMPT	YOUR NOTES
1 Where does the customer request first appear?	
2 How does the customer know you received it?	
3 Who becomes responsible for the next step?	
4 How does that person know what they need to do?	
5 How do you know when a request still has no owner?	

OWNERSHIP SIGNAL
If any answer depends on phrases like “someone usually sees it,” “we check that inbox,” or “someone follows up,” there may be an ownership gap in the process.

Kasence First Contact & Ownership Worksheet

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PART 3 - CURRENT-STATE VS. BETTER-STATE MAPPING

CURRENT STATE How it works now	BETTER STATE How it should work

PART 4 - GAPS TO IDENTIFY

Ownership gaps Where does responsibility become unclear?
System gaps Where are tools disconnected or duplicated?
Follow-up gaps Where do requests stall or go unresolved?

PART 5 - FIRST IMPROVEMENT TO MAKE

What is the first process change you should make?

REMINDER
Good systems do not replace the human interaction. They support it. The goal is to make sure the right person knows what needs to happen next.

Response Time Worksheet

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How Long Is Too Long to Respond to a New Customer?

Use this worksheet to define how new customer requests should be acknowledged, assigned, answered, and escalated.

THE RESPONSE FLOW



DEFINE YOUR RESPONSE STANDARD

CHANNEL OR REQUEST TYPE	ACKNOWLEDGEMENT TARGET	HUMAN RESPONSE TARGET
PRIMARY OWNER	ESCALATION TRIGGER	BACKUP OWNER

FLOW CHECK

PROMPT	NOTES		
1 How quickly should a new customer receive acknowledgement?	YES	NO	UNCLEAR
2 How quickly should a human respond?	YES	NO	UNCLEAR
3 Who owns that response?	YES	NO	UNCLEAR
4 What happens if the response does not occur on time?	YES	NO	UNCLEAR
5 Can the business see which requests are outside the response standard?	YES	NO	UNCLEAR

Response Time Worksheet

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MAP AND IMPROVE THE FLOW

Map the Current State. Design the Better State.

1. Current-state flow

What happens now?

2. Desired-state flow

What should happen?

3. Gaps, delays, and handoffs

4. Ownership and system issues

5. FIRST IMPROVEMENT TO MAKE

Choose the smallest change that improves the flow and can be measured.

30-DAY CHECK-IN

OWNER	REVIEW DATE	MEASURE OF SUCCESS

RESPONSE STANDARD

A useful response standard is defined, owned, visible, and supported by escalation. Review it by request type, urgency, channel, operating hours, and customer expectation.

Why Customer Requests Fall Through the Cracks

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Companion worksheet for Kasence Flow Insights - Episode 5

A request can be received, discussed, or forwarded and still never reach an outcome. Use this worksheet to make ownership, status, next action, and exceptions visible.

THE REQUEST FLOW



THE KASENCE FLOW CHECK

Answer these five questions for one real customer request.

PROMPT	YOUR NOTES
1 Can you see every customer request that is still open? Identify where open requests are visible without asking individual employees.	<hr/> <hr/>
2 Does every open request have one accountable owner? Name the one role or person responsible for moving it to the next outcome.	<hr/> <hr/>
3 Can you distinguish a forwarded request from an accepted handoff? Confirm that responsibility was accepted, not merely passed along.	<hr/> <hr/>
4 Does every open request have a visible status and next action? Someone should be able to see what is happening and what must happen next.	<hr/> <hr/>
5 What happens when a request is stalled, overdue, or unowned? Define the review, reminder, reassignment, or escalation path.	<hr/> <hr/>

IF ONE ANSWER IS UNCLEAR:

The request may be moving through activity without moving toward an outcome.

Why Customer Requests Fall Through the Cracks

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MAP ONE OPEN REQUEST

Choose one real request that is still open, delayed, unclear, or repeatedly handed off.

CUSTOMER REQUEST / NEED
1 RECEIVED WHERE? Inbox, CRM, phone, form, or another channel
2 ACCOUNTABLE OWNER One person or role
3 CURRENT STATUS What is happening now?
4 NEXT ACTION What must happen next?
5 EXPECTED TIME When should it happen?
6 EXCEPTION PATH What happens if it stalls?

WHERE DOES IT FALL THROUGH?

Mark the kind of gap you see most clearly.

Ownership	Handoff	Visibility	Status	Next action	Exception
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WHAT IS HAPPENING TODAY? Describe the current process, including workarounds, unclear ownership, or repeated follow-up.
WHAT SHOULD HAPPEN INSTEAD? Describe the intended owner, status, next action, timing, and exception path.
THE FIRST IMPROVEMENT I WOULD MAKE Choose one change that makes the request easier to own, see, and complete.

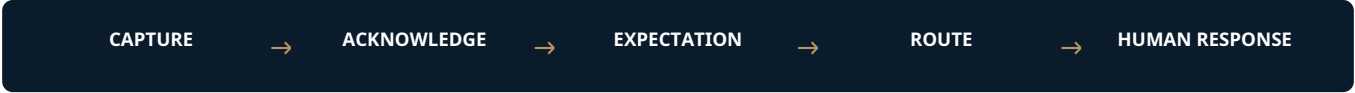
READY FOR A SECOND SET OF EYES? Take the Kasence Flow Check at kasence.com/contact

What should happen after hours?

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Use this worksheet to make acknowledgement, routing, ownership, and human follow-up visible.

CORE FLOW



THE FIVE FLOW CHECK QUESTIONS

PROMPT	YOUR NOTES
1 What acknowledgement does a customer receive after contacting your business outside normal hours?	
2 Does that acknowledgement clearly explain when a human will respond and what the customer should do if the situation is urgent?	
3 How is each after-hours request captured, classified, and routed to the correct person or team?	
4 Who becomes accountable for the next human response, and by what deadline must that response happen?	
5 How can your business verify that the customer received a response - and identify or escalate any request that did not?	
REMEMBER Acknowledgement creates confidence. Accountable human follow-up completes the promise.	

What should happen after hours?

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MAP ONE REQUEST

Map one real after-hours request. Choose a recent request and trace what happened from initial contact through the next human response.

CUSTOMER REQUEST OR SCENARIO What did the customer need?
CONTACT CHANNEL AND TIME RECEIVED Phone • form • email • chat • text
ACKNOWLEDGEMENT SENT What did the customer receive?
PROMISED RESPONSE TIME
URGENT OR EXCEPTION PATH
ACCOUNTABLE OWNER
NEXT HUMAN ACTION
HOW STATUS IS VISIBLE
ESCALATION IF OVERDUE
CURRENT STATE
DESIRED STATE
FIRST IMPROVEMENT TO MAKE

Why do two customers get two different experiences?

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Use this worksheet to identify where variation enters the customer experience - and what should stay consistent.

CORE FLOW



THE FIVE FLOW CHECK QUESTIONS

PROMPT	YOUR NOTES
1 If two employees receive the same type of customer request, would they follow roughly the same process?	
2 Which parts of your customer experience are clearly defined, and which depend primarily on individual habits or experience?	
3 When a customer moves from one employee to another, does the important information move with them?	
4 Do employees know what to do when a request does not fit the normal process, or does each person decide independently?	
5 Can your business identify where customers are receiving different experiences and determine why the variation is happening?	

REMEMBER
Consistency should protect the important moments without making service robotic.

Why do two customers get two different experiences?

Human Service. Smarter Systems.

MAP ONE REQUEST

Compare one real customer request. Choose one common request and compare how two different employees might handle it today.

CUSTOMER REQUEST OR SCENARIO
What did the customer need?

COMPARISON POINT	EMPLOYEE A	EMPLOYEE B
ACKNOWLEDGEMENT		
INFORMATION CAPTURED		
EXPECTATION SET		
NEXT STEP / OWNER		
HANDOFF / FOLLOW-UP		

WHERE DOES THE EXPERIENCE VARY?

MINIMUM STANDARD TO DEFINE

FIRST IMPROVEMENT TO MAKE

What are repeated questions telling you?

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Use these questions to identify where customers and employees are repeatedly searching for information, confidence, or visibility.

CORE FLOW



THE FIVE FLOW CHECK QUESTIONS

PROMPT	YOUR NOTES
1 What questions do customers ask your employees repeatedly - especially about timing, next steps, requirements, status, or ownership?	<div></div>
2 For each common question, where is the answer currently available, and can the customer realistically find it when they need it?	<div></div>
3 Do your website, confirmations, employees, and internal systems give customers the same answer, or are there conflicting versions of the information?	<div></div>
4 What questions do employees repeatedly ask each other because important information is difficult to find or depends on tribal knowledge?	<div></div>
5 Which recurring question could you reduce first by providing a clearer answer at a better point in the customer journey?	<div></div>
REMEMBER Trace the repeated question backward. Improve the moment before the customer needed to ask.	

What are repeated questions telling you?

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TRACE ONE REPEATED QUESTION

Turn one recurring question into a process improvement. Choose one real question you hear repeatedly. Follow it back to the information gap, then decide where the answer should become visible.

REPEATED QUESTION

What do customers or employees keep asking?

WHO ASKS IT?

Customer • employee • both

WHERE DOES THE ANSWER LIVE TODAY?

Website • email • CRM • scheduling • document • person • other

WHY DO THEY STILL NEED TO ASK?

Missing • hard to find • unclear • inconsistent • badly timed • no status visibility

BEST MOMENT TO PROVIDE THE ANSWER

Where in the customer or employee journey should it appear?

BEST CHANNEL OR SYSTEM

Where should the reliable answer be delivered or displayed?

ACCOUNTABLE OWNER

Who keeps the information accurate and consistent?

FIRST IMPROVEMENT TO MAKE

What will you change first so this question becomes less necessary?

How visible is your customer process?

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Use these five questions to identify where customers are forced to ask for status because ownership, milestones, or expectations are not visible.

CORE FLOW



THE FIVE FLOW CHECK QUESTIONS

PROMPT	YOUR NOTES
1 After a customer makes a request, can they clearly understand what happens next and when they should expect another response?	
2 Can your employees quickly identify who owns an open request, what stage it is in, and what the next action should be?	
3 Which meaningful milestones in your process should trigger a proactive customer update?	
4 What happens when a promised response date or milestone is missed? Does someone become responsible for communicating the delay?	
5 How many customer calls, emails, or messages are simply asking for status that your process could have provided proactively?	

REMEMBER
If customers keep asking “Any update?”, look at why the progress was invisible before they had to ask.

How visible is your customer process?

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MAP ONE STATUS JOURNEY

Map one real customer request. Trace one request from receipt through completion and decide where proactive status updates should happen.

CUSTOMER REQUEST OR SCENARIO What did the customer need?
ACCOUNTABLE OWNER
CURRENT STAGE
NEXT ACTION
PROMISED RESPONSE DATE
CUSTOMER-VISIBLE MILESTONES Which changes actually matter to the customer?
CURRENT UPDATE METHOD Phone • email • text • portal • none
WHAT HAPPENS IF OVERDUE? Owner • escalation • customer communication
FIRST IMPROVEMENT TO MAKE One change to reduce “Any update?” contacts
FLOW CHECK ACTION Capture Assign Set Update Escalate

Does customer context move with the work?

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Use these five questions to identify where customer history, promises, ownership, or next steps are being lost between employees, teams, or systems.

CORE FLOW



THE FIVE FLOW CHECK QUESTIONS

PROMPT	YOUR NOTES
1 When a customer moves from one employee to another, does the next person know why the customer contacted you and what has already happened?	
2 Can employees easily see what information the customer has already provided, or do they routinely ask for the same details again?	
3 When a request is handed off, are the next action, owner, customer expectation, and promised timing clearly documented?	
4 Is important customer information scattered across email, forms, scheduling systems, messages, notes, and other tools that employees have to search individually?	
5 How often is the customer the only person who can explain the complete history of their own request?	
REMEMBER If the customer has to start the story over, make the context move with the work.	

Does customer context move with the work?

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TRACE ONE CUSTOMER HANDOFF

Trace one real customer handoff. Follow one request across a handoff and identify what the next employee needs before speaking with the customer.

CUSTOMER REQUEST OR SCENARIO What did the customer need?
FIRST EMPLOYEE / TEAM
NEXT OWNER
INFORMATION CAPTURED What facts or details were recorded?
WHAT WAS PROMISED Expectation, timing, or commitment
WHAT INFORMATION MOVED WITH THE HANDOFF What could the next person actually see?
WHAT THE CUSTOMER HAD TO REPEAT What did they have to explain again?
MISSING CONTEXT What should have moved but did not?
DESIRED HANDOFF What should the next employee receive before contact?
FIRST IMPROVEMENT TO MAKE One change to preserve context
FLOW CHECK ACTION Capture Connect Hand Off Confirm Continue

Ownership Gap

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What happens when ownership changes?

Use this worksheet to find where requests get routed without clear accountability.

THE OWNERSHIP FLOW



THE KASENCE FLOW CHECK

PROMPT	YOUR NOTES
1 When an employee receives a request they cannot personally resolve, is there a clear process for getting it to the right person without sending the customer away to start over?	<div></div> <div></div>
2 During a handoff, who remains responsible until the next employee or team has clearly accepted ownership?	<div></div> <div></div>
3 Can employees see who currently owns an open request, what the next action is, and when it should happen?	<div></div> <div></div>
4 What happens when a request is transferred, routed, or assigned but the next person does not respond or accept responsibility?	<div></div> <div></div>
5 How often do customers contact multiple employees or departments because nobody appears to own the complete journey?	<div></div> <div></div>

REMEMBER
The customer should not have to navigate your organization to find someone who will own the next step.

Ownership Gap

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TRACE ONE CROSS-TEAM REQUEST

Choose a request that moved between people or teams and map where ownership changed.

CUSTOMER REQUEST
What did the customer need?

FIRST EMPLOYEE / TEAM
Where did the request begin?

WHY IT NEEDED TO MOVE
Why could the first person not resolve it?

NEXT OWNER / TEAM
Who should have accepted responsibility?

CONTEXT TRANSFERRED
What information moved with the handoff?

EXPECTED NEXT ACTION
What should happen next?

EXPECTED TIMING
When should it happen?

WHO CONFIRMS RECEIPT
Who verifies that the next owner accepted it?

IF OWNERSHIP IS NOT ACCEPTED
What escalation path should activate?

FIRST IMPROVEMENT TO MAKE
What one change would make ownership clearer at this handoff?

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

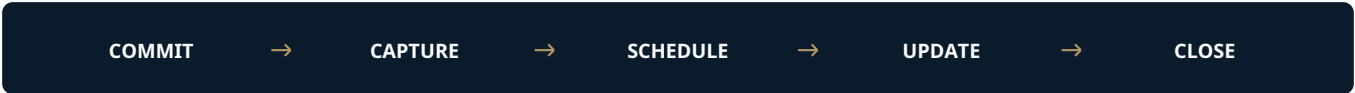
Follow-Up Gap

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Where do follow-up promises disappear?

Use these questions to test whether customer commitments become visible work.

THE FOLLOW-UP FLOW



THE KASENCE FLOW CHECK

PROMPT	YOUR NOTES
1 When an employee tells a customer, 'I'll get back to you,' where is that commitment recorded?	
2 Does every follow-up have a clear owner and a specific time when the customer should hear from you again?	
3 Can employees or managers easily see which customer follow-ups are still open and which are overdue?	
4 If the final answer is delayed, is there a process for updating the customer before the promised communication time passes?	
5 What happens to an open follow-up if the employee who made the promise is unavailable, overloaded, or no longer owns the request?	

REMEMBER
A customer should never have to remind your business about a promise your business already made.

Follow-Up Gap

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TRACE ONE FOLLOW-UP PROMISE

Choose a real commitment and map how ownership, timing, visibility, updates, and closure should work.

CUSTOMER / REQUEST What was the customer waiting for?
PROMISE MADE What exactly did the employee say would happen?
OWNER Who owns the follow-up?
PROMISED UPDATE TIME When should the customer hear from you again?
WHERE IT IS RECORDED Where does the commitment become visible?
REMINDER METHOD How is the owner reminded before it is due?
CURRENT STATUS Open, delayed, reassigned, completed, or overdue?
OVERDUE / ESCALATION PATH What happens if the promised time passes?
CUSTOMER UPDATE What should the customer hear if the final answer is delayed?
FIRST IMPROVEMENT TO MAKE What one change would make follow-up commitments more visible and reliable?

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

Consistency Gap

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Do customers get the same answer?

Use these questions to find where inconsistent information enters the customer experience.

THE CORE FLOW



THE KASENCE FLOW CHECK

PROMPT	YOUR NOTES
1 If two employees receive the same common customer question today, where do they go to find the current answer?	<div></div> <div></div> <div></div>
2 Are common exceptions, approval rules, and situations that do not fit the standard policy documented, or do employees learn them informally over time?	<div></div> <div></div> <div></div>
3 When a policy, price, process, or service rule changes, how do employees know that the old answer is no longer correct?	<div></div> <div></div> <div></div>
4 When an employee is unsure about an answer, is there a clear and practical way to verify it before responding to the customer?	<div></div> <div></div> <div></div>
5 Can front-line employees report confusing, missing, or contradictory guidance so the official answer can be improved?	<div></div> <div></div> <div></div>

REMEMBER
Consistency should give employees a dependable foundation - not turn them into scripts.

Consistency Gap

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COMPARE ONE COMMON CUSTOMER QUESTION

Use a real question and trace how different answers can enter the process.

CUSTOMER QUESTION What is the common question customers ask?
EMPLOYEE A ANSWER What would one employee say today?
EMPLOYEE B ANSWER What might another employee say?
CURRENT SOURCE Where should employees find the official answer?
STANDARD ANSWER What facts or rules should remain consistent?
COMMON EXCEPTIONS What situations legitimately change the answer?
APPROVAL / ESCALATION Who decides when the standard answer does not fit?
CHANGE COMMUNICATION How are updates shared and old guidance removed?
VERIFICATION PATH How should employees verify uncertainty before answering?
FIRST IMPROVEMENT TO MAKE What one change would make this answer more dependable across employees?

READY FOR A SECOND SET OF EYES?
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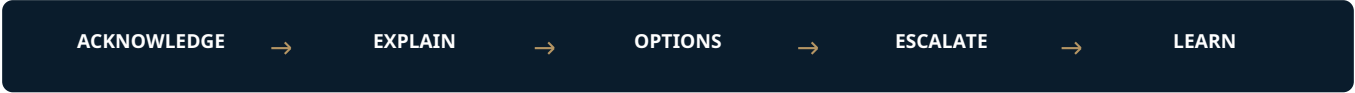
Policy Gap

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Does policy help customers understand?

Use these questions to find where a valid boundary turns into a frustrating dead end.

THE CORE FLOW



THE KASENCE FLOW CHECK

PROMPT	YOUR NOTES
1 When an employee tells a customer that something is policy, can the employee also explain why the policy exists?	<div></div> <div></div> <div></div>
2 Do employees know what options are available inside the policy before they simply say no?	<div></div> <div></div> <div></div>
3 Are common exceptions, approval limits, and escalation paths clear enough that employees know when to ask for help?	<div></div> <div></div> <div></div>
4 When the answer must remain no, do employees know how to explain the boundary and give the customer a useful next step?	<div></div> <div></div> <div></div>
5 Can front-line employees report policies that repeatedly confuse customers, create unnecessary escalations, or no longer match how the business operates?	<div></div> <div></div> <div></div>

REMEMBER
A policy can stay firm while the explanation becomes clearer, more useful, and more human.

Policy Gap

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EXAMINE ONE CUSTOMER-FACING POLICY

Trace the rule, the reason, the options, and what should happen when the situation does not fit.

POLICY / RULE What policy or boundary are customers hearing?
WHY IT EXISTS What operational, safety, fairness, quality, or business reason supports it?
CUSTOMER IMPACT What does the customer experience when this rule applies?
AVAILABLE OPTIONS What can the employee offer without breaking the policy?
COMMON EXCEPTIONS What legitimate situations may require a different path?
APPROVAL AUTHORITY Who can approve an exception and within what limits?
ESCALATION PATH When should the employee escalate, and what information is needed?
EXPLANATION LANGUAGE How can the rule be explained clearly without sounding dismissive?
FRONT-LINE FEEDBACK How should repeated confusion or recurring exceptions be reported?
FIRST IMPROVEMENT TO MAKE What one change would make this policy easier for employees to explain and customers to understand?

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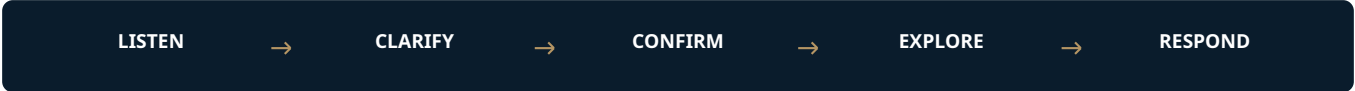
Discovery Gap

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Do we understand the need before answering?

Use these questions to find where premature assumptions turn into premature refusal.

THE CORE FLOW



THE KASENCE FLOW CHECK

PROMPT	YOUR NOTES
1 Before answering yes or no, do employees clarify what the customer is actually trying to accomplish?	<div></div> <div></div> <div></div>
2 Can employees distinguish between the solution the customer requested and the underlying outcome the customer needs?	<div></div> <div></div> <div></div>
3 If the exact request is unavailable, do employees know what legitimate alternatives, adjacent services, escalation paths, or referrals may still help?	<div></div> <div></div> <div></div>
4 When the business truly cannot help, can employees explain why and give the customer a useful next step rather than simply ending the conversation?	<div></div> <div></div> <div></div>
5 Are repeated requests the business cannot serve captured so leadership can identify confusing marketing, training gaps, referral needs, or potential service opportunities?	<div></div> <div></div> <div></div>

REMEMBER

The goal is not to avoid saying no. It is to make sure no is answering the right question.

Discovery Gap

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SEPARATE THE REQUEST FROM THE NEED

Use one real customer request and trace what the customer was actually trying to accomplish.

CUSTOMER REQUEST What did the customer specifically ask for?
UNDERLYING NEED What outcome were they actually trying to achieve?
DISCOVERY QUESTION What question would help clarify the need?
CONFIRMATION How would you repeat the need back before solving it?
OPTION 1 What legitimate option could meet the need?
OPTION 2 What other legitimate path, service, timing, or referral could help?
LIMIT / TRUE NO What cannot the business safely or reliably provide?
USEFUL NEXT STEP If the answer is no, what can the customer do next?
PATTERN TO CAPTURE Should this request be tracked as a recurring unmet need or expectation gap?
FIRST IMPROVEMENT TO MAKE What one change would help employees understand the need before deciding on the answer?

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

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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.

Next Step Clarity

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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

Handoff Clarity

Human Service. Smarter Systems.

Handoff Clarity Worksheet

A handoff is not complete when one person lets go. It is complete when the next person clearly receives the work and accepts ownership.

THE CORE FLOW



THE KASENCE FLOW CHECK

PROMPT	YOUR NOTES
1 When work moves from one person or team to another, is it clear exactly what information must move with it?	
2 Can your business tell the difference between a handoff that was sent and one that was actually received?	
3 At what point does the next person clearly accept ownership of the work and its next action?	
4 If the receiving person is unavailable, the information is incomplete, or the handoff is overdue, is there a defined backup or escalation path?	
5 Can you identify open work that is currently between owners - sent by one person but not yet clearly accepted by the next?	

REMEMBER

The individual process steps may work. The risk may be in what happens between them.

Handoff Clarity

Human Service. Smarter Systems.

TRACE ONE REAL HANDOFF

Choose a recent handoff and trace what happened from the moment one owner released the work until the next owner clearly accepted responsibility.

CUSTOMER / REQUEST / WORK ITEM What are you tracing?		
HANDOFF TRIGGER What event caused responsibility to move?		
INFORMATION THAT MUST MOVE What context, promises, timing, approvals, or exceptions are required?		
RELEASING OWNER	RECEIVING OWNER	
HOW RECEIPT IS CONFIRMED How do you know the next person actually received it?		
WHEN OWNERSHIP OFFICIALLY CHANGES What event shows the next person now owns the work?		
EXPECTED NEXT ACTION What should the receiving owner do next, and by when?		
BACKUP / ESCALATION PATH What happens if the handoff is incomplete, overdue, or the owner is unavailable?		
CURRENT-STATE HANDOFF	DESIRED-STATE HANDOFF	
INFORMATION GAP	OWNERSHIP GAP	TIMING / VISIBILITY GAP
FIRST IMPROVEMENT TO MAKE What one change would make this handoff clearer or more reliable?		

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

KASENCE FLOW INSIGHTS | EPISODE 18

Coordination Friction

Human Service. Smarter Systems.

Use this worksheet to examine one routine process and identify where employees spend time checking, reminding, messaging, or following up internally just to keep work moving.

EPISODE 18 CORE FLOW

WORK ARRIVES → OWNER → STATUS VISIBLE → NEXT ACTION → UPDATE → COMPLETE

CHOOSE ONE ROUTINE PROCESS

Process being reviewed	Department / team
Why this process matters	Who is affected

CURRENT-STATE PROCESS NOTES

PROMPT	NOTES
Where does the work arrive, and who owns it first?	
Who needs to see the status, and what is the usual next action?	
How is status updated today?	
How does the process close as complete?	

SIGNALS OF COORDINATION FRICTION

- What employees keep asking each other
 - What information they are trying to find
- Where people manually check, remind, message, or follow up
 - Where the process depends on memory instead of visibility

KASENCE FLOW INSIGHTS | EPISODE 18

Coordination Friction

Human Service. Smarter Systems.

THE KASENCE FLOW CHECK

PROMPT	YOUR NOTES
1 How often do employees have to ask coworkers for the status of routine work?	
2 Can the people who depend on a task easily see who owns it and what should happen next?	
3 When something changes, does the status become visible through the normal process, or does someone have to manually tell everyone who needs to know?	
4 How much employee time is spent checking, reminding, messaging, or following up internally just to keep routine work moving?	
5 If you removed the employee who usually remembers to check on everything, would the process still reliably move forward?	

DESIGN A BETTER FLOW

IMPROVEMENT AREA	YOUR NEXT-STEP DECISION
How will work arrive in a visible way?	
How will ownership be made clear?	
How will status become visible without extra messages?	
How will the next action be made obvious?	
How will completion be visible?	

FIRST IMPROVEMENT TO MAKE THIS WEEK

What is the first change you will make?

Who owns it?

By when?

How will you know the change worked?

REMINDER

Coordination is necessary. Constant coordination is a process signal. The goal is not to eliminate teamwork. The goal is to reduce the checking, reminding, messaging, and follow-up that exist because the process itself does not provide enough clarity.

READY FOR A SECOND SET OF EYES?

Take the Kasence Flow Check at kasence.com/contact

KASENCE FLOW INSIGHTS | EPISODE 19

Information Friction

Human Service. Smarter Systems.

Trace one piece of information through a real workflow and identify where employees copy, re-enter, forward, search for, or reconcile information the business already has.

EPISODE 19 CORE FLOW



CHOOSE ONE PIECE OF INFORMATION

Information being traced	Process / customer request
Where it first enters	Who first captures it
Why this information matters	Who needs it to continue the work

CURRENT-STATE INFORMATION JOURNEY

PROMPT	NOTES
Where is the information first captured, and in what system, tool, inbox, form, or record?	
Where is it copied, forwarded, re-entered, or recreated before work can continue?	
Who needs this information, and how do they find it today?	
Where do duplicate updates happen or where must the same status be changed more than once?	
Where can the information become invisible, stale, incomplete, or conflict with another version?	

SIGNALS OF INFORMATION FRICTION

- Repeated entry / manual copying
 - Searching several systems before work can continue
- Customers or employees have to repeat information already provided
 - Different places show different or outdated versions

KASENCE FLOW INSIGHTS | EPISODE 19

Information Friction

Human Service. Smarter Systems.

THE KASENCE FLOW CHECK

PROMPT	YOUR NOTES
1 What customer or job information does your staff enter, copy, forward, or re-enter more than once during a normal workflow?	
2 When information first enters the business, is there a clear place where it should be reliably captured?	
3 Can the employees who need information find and use it without asking another employee to resend, copy, or reconstruct it?	
4 When information changes, is there a clear way to know which version is current and reliable?	
5 If you watched one routine customer request from beginning to end, how many times would you see the same information manually moved from one place to another?	

DESIGN A BETTER INFORMATION FLOW

IMPROVEMENT AREA	YOUR NEXT-STEP DECISION
Where should important information first be reliably captured?	
Who needs appropriate visibility to use it?	
How can employees use the information without recreating or re-sending it?	
How will meaningful changes stay current and reliable?	
What should the completed record preserve for the next legitimate business need?	

FIRST IMPROVEMENT TO MAKE THIS WEEK

What is the first change you will make?

Who owns it?

By when?

How will you know the change worked?

REMINDER
Information should support the work. Moving the same information around should not become the work. The goal is not to eliminate legitimate information movement. The goal is to reduce movement that adds no value, creates duplicate work, or makes employees and customers carry information the process should already know.

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

KASENCE FLOW INSIGHTS | EPISODE 20

Reminder Reliability

Human Service. Smarter Systems.

Trace one appointment reminder process and identify where timing, delivery, visibility, or exceptions can fail before the customer is informed.

EPISODE 20 CORE FLOW



CHOOSE ONE APPOINTMENT TYPE

Appointment / service type	Customer / audience
Where appointment is created	Who owns reminder reliability
Why this appointment matters	Normal reminder window / timing

CURRENT-STATE REMINDER JOURNEY

PROMPT	NOTES
When is the appointment created, and what customer information is required?	
What triggers the reminder, and when should it happen?	
Which channel is used, and what information is included?	
How does the business know the reminder was actually sent?	
What happens if delivery fails, contact information is missing, or the appointment changes?	
Who owns the exception, and how does the process close the loop?	

SIGNALS OF A REMINDER GAP

- Reminder depends on someone remembering
 - Scheduled is assumed to mean sent
- Failed delivery can disappear silently
 - Changes do not reliably update the reminder

KASENCE FLOW INSIGHTS | EPISODE 20

Reminder Reliability

Human Service. Smarter Systems.

THE KASENCE FLOW CHECK

PROMPT	YOUR NOTES
1 When an appointment is scheduled, is there a clearly defined rule for when the customer should receive a reminder?	
2 Can your business tell whether the expected reminder was actually sent, rather than simply assuming it happened?	
3 If a phone number or email address is missing, invalid, or the reminder fails, does the process create a visible exception for someone to handle?	
4 When an appointment is changed or scheduled inside the normal reminder window, does the reminder process adjust with it?	
5 Could you identify tomorrow's appointments that have not received the expected reminder without checking each one manually?	

DESIGN A BETTER REMINDER FLOW

IMPROVEMENT AREA	YOUR NEXT-STEP DECISION
How will the appointment and contact information be captured correctly?	
What rule will trigger the reminder, and when?	
Which channel will be used consistently?	
How will reminder activity be visible?	
What will happen when normal delivery cannot happen?	
How will you know the customer has the clarity the process is meant to provide?	

FIRST IMPROVEMENT TO MAKE THIS WEEK

What is the first change you will make?

Who owns it?

By when?

How will you know the change worked?

REMINDER

READY FOR A SECOND SET OF EYES?

Take the Kasence Flow Check at kasence.com/contact

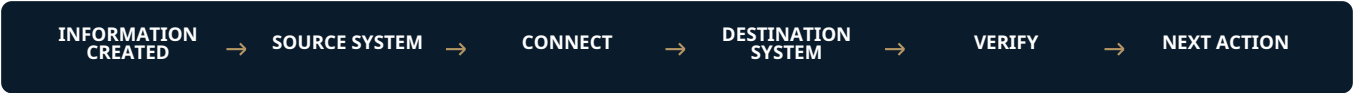
KASENCE FLOW INSIGHTS | EPISODE 21

System Connection

Human Service. Smarter Systems.

Trace one important workflow and identify where employees are manually connecting systems that should support the flow more reliably.

EPISODE 21 CORE FLOW



CHOOSE ONE IMPORTANT WORKFLOW

Business event to trace	Why this event matters
Source system	Destination system
Current owner / team	Expected next business action

CURRENT-STATE SYSTEM CONNECTION

PROMPT	NOTES
What information is created when the business event happens?	
Where does the reliable information begin?	
How does the information currently move to the next system?	
Does an employee copy, re-enter, forward, or manually transfer it?	
How does the business verify that the transfer happened correctly?	
What happens if the transfer fails or never happens?	

SIGNALS OF A SYSTEM GAP

- Employees repeatedly bridge the same two tools
 - The source of truth is unclear
- Transfers can fail without anyone noticing
 - The next action depends on one person remembering

KASENCE FLOW INSIGHTS | EPISODE 21

System Connection

Human Service. Smarter Systems.

THE KASENCE FLOW CHECK

PROMPT	YOUR NOTES
1 Where in your business do employees routinely copy, re-enter, forward, or manually transfer information from one system to another?	<div></div> <div></div>
2 For those transfers, is there a clearly defined source system that holds the reliable version of the information?	<div></div> <div></div>
3 When information needs to reach another system, is the transfer method dependable - or does it rely on an employee remembering to do it?	<div></div> <div></div>
4 If a system-to-system transfer fails or does not happen, can your business see the exception before it affects the customer or the next step?	<div></div> <div></div>
5 If the employee who normally connects two parts of the process were unavailable tomorrow, would the information still reach the right place and trigger the right next action?	<div></div> <div></div>

DESIGN A STRONGER SYSTEM CONNECTION

IMPROVEMENT AREA	YOUR DECISION
What business event should trigger the flow?	
Which system should be the reliable source?	
How should the information move?	
Where must the information be available next?	
How will you verify the transfer or surface an exception?	
What next business action should happen because the information arrived?	

FIRST IMPROVEMENT TO MAKE THIS WEEK

What is the first connection or handoff you will improve?

Who owns it?

By when?

How will you know the change worked?

REMINDER

READY FOR A SECOND SET OF EYES?

Take the Kasence Flow Check at kasence.com/contact

KASENCE FLOW INSIGHTS | EPISODE 22

Customer Record Clarity

Human Service. Smarter Systems.

Map one customer journey and identify where customer context becomes fragmented, duplicated, or hard to trust.

EPISODE 22 CORE FLOW

CUSTOMER INTERACTION → CAPTURE → PRIMARY RECORD → SHARED VISIBILITY → UPDATE → HISTORY

CHOOSE ONE CUSTOMER JOURNEY

Customer journey to trace	Why this journey matters
Where the customer first appears	Primary customer record
Current owner / team	Who needs visibility

CURRENT-STATE CUSTOMER RECORD

PROMPT	NOTES
Where does the customer first appear?	
What information is collected from that interaction?	
Where is the reliable customer context anchored today?	
Which other systems also contain customer information?	
Which information is duplicated or can conflict?	
Who can update the reliable record?	
How are meaningful changes communicated or synchronized?	
Where is useful customer history stored?	

SIGNALS OF A CUSTOMER RECORD GAP

- Employees search several places before answering a customer
- Customers are asked to repeat information the business already collected
- Different systems show different versions of the same customer
- History depends on a coworker, inbox, message, or personal notes

KASENCE FLOW INSIGHTS | EPISODE 22

Customer Record Clarity

Human Service. Smarter Systems.

THE KASENCE FLOW CHECK

PROMPT	YOUR NOTES
1 If a customer contacted your business right now, would the employee helping them know exactly where to look for the most reliable customer information?	
2 When the same customer information exists in multiple systems, is it clear which location holds the authoritative version?	
3 Can employees see the customer's important history - requests, commitments, approvals, appointments, and open actions - without reconstructing it from emails, messages, or coworkers?	
4 When important customer information changes, is there a defined process for keeping the reliable record current?	
5 How often does your staff ask customers to repeat information because the business cannot easily find what was already provided?	

DESIGN A STRONGER CUSTOMER RECORD

IMPROVEMENT AREA	YOUR DECISION
Which customer interactions create information worth keeping?	
What information should be captured?	
Where should the primary / authoritative record live?	
Who needs shared visibility to serve the customer well?	
How will meaningful changes keep the reliable record current?	
What history should be preserved so employees have useful context?	

FIRST IMPROVEMENT TO MAKE THIS WEEK

What is the first customer-record gap you will improve?

Who owns it?

By when?

How will you know the change worked?

REMINDER

READY FOR A SECOND SET OF EYES?

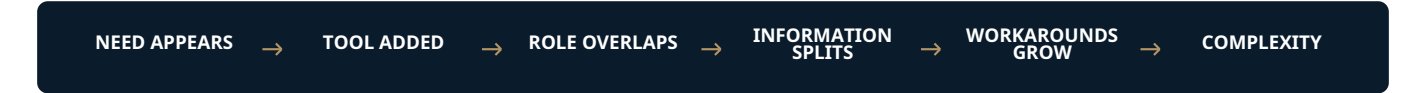
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App Sprawl

Human Service. Smarter Systems.

Inventory the applications involved in one real customer workflow and identify where roles overlap, information splits, or workarounds grow.

EPISODE 23 CORE FLOW



SELECT ONE CUSTOMER WORKFLOW

Customer workflow to trace

Why this workflow matters

Customer request starts in

Current owner / team

APPLICATION INVENTORY

Use one column per application. Add another copy of this page if the workflow uses more than three applications.

Inventory field	Application 1	Application 2	Application 3
Application / tool name			
Business problem it solves			
Who uses it			
Function it owns			
Customer information stored			
Other system with similar function			
Information coming in			
Information leaving			
Manual transfer / workaround			
What breaks if removed tomorrow?			
Classification: Keep / Connect / Consolidate / Replace / Review			

SIGNALS OF APP SPRAWL

- Employees open or check several apps to move one routine request forward
 - Two systems store the same important customer data without clear ownership
- Staff rely on copy-and-paste, spreadsheets, or personal reminders between tools
 - A new tool is added before the role of existing systems is reviewed

App Sprawl

Human Service. Smarter Systems.

THE KASENCE FLOW CHECK

PROMPT	YOUR NOTES
1 Can you clearly explain the primary business purpose of every application your employees use during routine customer work?	
2 Do two or more systems perform the same important function - such as customer records, scheduling, messaging, tasks, or notes - without a clear rule for which one owns it?	
3 How many different applications does an employee have to open or check to move one routine customer request from start to finish?	
4 Are employees using spreadsheets, copy-and-paste, personal reminders, or manual checks to compensate for gaps between your applications?	
5 Before adding another tool, does your business have a defined process for determining whether an existing system could solve the need - or whether another application should be replaced?	

DESIGN A BETTER TECHNOLOGY FLOW



PROMPT	YOUR DECISION
What business need are we solving?	
What is the tool's defined primary purpose?	
What system role should it own?	
What information should enter and leave it?	
Who owns the tool, data, and handoffs?	
When will we review whether it still earns its place?	

FIRST IMPROVEMENT TO MAKE THIS WEEK

What is the first app-sprawl issue you will improve?

Who owns it?

By when?

How will you know the change worked?

READY FOR A SECOND SET OF EYES?

Take the Kasence Flow Check at kasence.com/contact

path, and accountable ownership. Technology should earn its place in the workflow. Review what you keep, connect, consolidate, replace, or revisit based on how well the system supports the customer process.

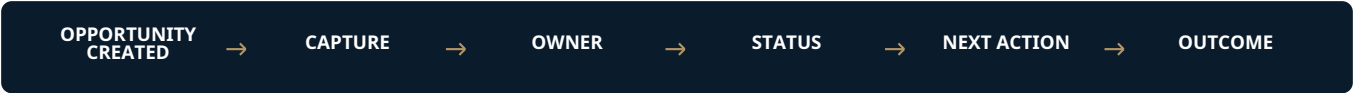
KASENCE FLOW INSIGHTS | EPISODE 24

Opportunity Visibility

Human Service. Smarter Systems.

Map one category of open customer opportunity and identify where unfinished work becomes visible, fragmented, stalled, or hard to manage.

EPISODE 24 CORE FLOW



CHOOSE ONE OPPORTUNITY CATEGORY

Opportunity category to trace	Why this category matters
Where it first appears	Where it is captured
Current owner / team	Who needs visibility

CURRENT-STATE OPPORTUNITY VISIBILITY

PROMPT	NOTES
Where does this opportunity first appear?	
Where is it captured so it can be reliably tracked?	
Who owns moving it forward?	
What statuses are used today?	
How is the next action recorded?	
How is timing or due-date information tracked?	
How does stalled or aging work become visible?	
Which other systems or personal lists contain related information?	
How is the opportunity closed when it is finished?	

SIGNALS OF A VISIBILITY GAP

- Open opportunities exist in several systems or personal lists.
 - Employees have to ask coworkers what is still open.
 - An opportunity can have no clear owner or next action.
- Customers are the first to notice that work stopped moving.
 - Old opportunities remain open long after they are actually finished.
 - Management cannot quickly answer what needs attention today.

KASENCE FLOW INSIGHTS | EPISODE 24

Opportunity Visibility

Human Service. Smarter Systems.

THE KASENCE FLOW CHECK

PROMPT	YOUR NOTES
1 Can your business quickly produce a reliable list of every open customer opportunity that still requires action?	
2 For each open opportunity, can you clearly see who owns it, its current status, and what should happen next?	
3 Can you identify opportunities that have gone too long without activity before the customer has to follow up?	
4 Are leads, estimates, callbacks, approvals, and other open work visible together - or do employees have to search multiple systems and personal lists to find them?	
5 When an opportunity is won, lost, declined, completed, or otherwise finished, is there a consistent process for closing it so your open pipeline remains accurate?	

DESIGN A STRONGER OPPORTUNITY FLOW

IMPROVEMENT AREA	YOUR DECISION
What belongs on the open-opportunity list?	
Where should each opportunity be captured?	
Who owns moving each opportunity forward?	
Which statuses explain where work stands?	
How will the next action and timing be recorded?	
How will aging or stalled work be surfaced?	
What outcome closes the opportunity?	

FIRST IMPROVEMENT TO MAKE THIS WEEK

What is the first visibility gap you will improve?

Who owns it?

By when?

How will you know the change worked?

READY FOR A SECOND SET OF EYES?

Take the Kasence Flow Check at kasence.com/contact

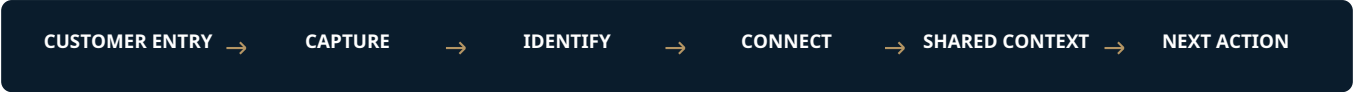
Disconnected Entry Points

Human Service. Smarter Systems.

Why Your Website, Phone, and Customer System Need to Know About Each Other

Customers may enter through different channels, but the business should not treat every channel like a separate customer journey. Use this worksheet to trace one real customer request and see where context, ownership, or the next action can become disconnected.

EPISODE 25 CORE FLOW



CHOOSE ONE REAL CUSTOMER WORKFLOW

PROMPT	NOTES
Customer / Request Pick one recent inquiry, appointment, estimate request, or service request.	
1. Customer Entry Where did the customer first enter - website form, phone, email, text, scheduling, or another channel?	
2. Capture Where did that interaction become visible to the business?	
3. Identify How did the business determine whether this was a new or existing customer / opportunity?	
4. Connect How were interactions from other channels connected to the same customer or request?	
5. Shared Context What information could the next employee see without making the customer repeat themselves?	
6. Next Action What happened next, who owned it, and where was that next action visible?	

EPISODE 25 FRICTION SIGNALS

- Same customer creates multiple records or follow-ups.
 - Employees cannot see what happened in another channel.
 - Customer has to repeat the same information.
- Ownership changes when the channel changes.
 - Scheduling, CRM, email, phone, or website hold different versions of the story.

Disconnected Entry Points

Human Service. Smarter Systems.

THE KASENCE FLOW CHECK

PROMPT	YES / PARTLY / NO
1 When a customer contacts your business through your website, phone, email, text, or scheduling system, does that interaction reliably enter a process someone can see and own?	☐ YES ☐ PARTLY ☐ NO
2 Can your business recognize when interactions from different channels belong to the same customer, opportunity, or appointment?	☐ YES ☐ PARTLY ☐ NO
3 When a customer changes channels - for example, from a website form to a phone call - can the next employee see enough context to continue the conversation without unnecessarily starting over?	☐ YES ☐ PARTLY ☐ NO
4 Do any of your entry points create duplicate records, duplicate follow-ups, or separate workflows for what is actually one customer request?	☐ YES ☐ PARTLY ☐ NO
5 For each major customer entry point, can you clearly explain what happens immediately after the interaction arrives and who is responsible for the next action?	☐ YES ☐ PARTLY ☐ NO

BETTER PROCESS / BETTER FLOW

What should happen instead?

Describe the connected process you want across the major customer entry points.

FIRST IMPROVEMENT TO MAKE THIS WEEK

Choose one practical change that improves capture, identity, shared context, ownership, or the next action.

REMINDER

The goal is not to force every customer channel into one application. The goal is to make sure the channels support one connected process with shared context and a clear next action.

READY FOR A SECOND SET OF EYES?

Take the Kasence Flow Check at kasence.com/contact

Estimate Gap

Human Service. Smarter Systems.

Why Good Estimates Go Cold

A good estimate can still go cold when the process stops after somebody clicks Send. Use this worksheet to trace one real estimate and see whether delivery, ownership, decision status, or the next action becomes unclear.

EPISODE 26 CORE FLOW



CHOOSE ONE REAL ESTIMATE

PROMPT	NOTES
Customer / Opportunity Choose one recent estimate that is still open, stale, approved, declined, or uncertain.	
Estimate / Proposal Use the actual estimate and its related customer activity.	
1. Customer Interest What did the customer ask for, and what need or opportunity was confirmed?	
2. Estimate Created When was the estimate created, and did the scope and pricing reflect what the customer actually needed?	
3. Delivered How was the estimate sent - email, text, portal, printed copy, or another channel?	
4. Receipt Visible What evidence exists that delivery succeeded? Were there any bounce, access, or 'never received it' issues?	
5. Decision Status What is the customer's current status - considering, question pending, revision requested, waiting, approved, declined, or unknown?	
6. Outcome What ultimately happened, or what defined outcome still needs to be recorded?	

ESTIMATE GAP FRICTION SIGNALS

- Sent is treated as complete even when delivery is uncertain.
 - Open estimates have no visible age, status, owner, or next action.
 - Customer questions or revision requests do not become visible work.
- Declined estimates and silent/stale estimates look the same.
 - The business cannot explain what happened to valuable opportunities after the estimate was sent.

Estimate Gap

Human Service. Smarter Systems.

THE KASENCE FLOW CHECK

PROMPT	YES / PARTLY / NO
1 After an estimate is sent, can your business tell whether it was successfully delivered - or does sent automatically count as complete?	☐ YES ☐ PARTLY ☐ NO
2 Can employees quickly see which estimates are still open, how long they have been open, and their current decision status?	☐ YES ☐ PARTLY ☐ NO
3 When a customer asks a question, requests a revision, or needs more information, does that become visible work with clear ownership?	☐ YES ☐ PARTLY ☐ NO
4 Can you distinguish between an estimate the customer declined and one that simply stopped moving with no known outcome?	☐ YES ☐ PARTLY ☐ NO
5 How many estimates are currently sitting open with no clear next action, no recent activity, and no defined outcome?	☐ YES ☐ PARTLY ☐ NO

ESTIMATE STATUS SNAPSHOT

- ☐ Created
- ☐ Received
- ☐ Customer Considering
- ☐ Stale
- ☐ Sent
- ☐ Question Pending
- ☐ Approved
- ☐ Closed
- ☐ Delivery Uncertain
- ☐ Revision Needed
- ☐ Declined

BETTER PROCESS / BETTER FLOW

What should happen after an estimate is sent?
Describe the process you want for delivery visibility, customer questions, ownership, decision status, next action, and outcome.

FIRST IMPROVEMENT TO MAKE THIS WEEK

Choose one practical change that would make an open estimate easier to see, own, follow, or close.

REMINDER
The goal is not to pressure customers into faster decisions. The goal is to understand what is happening to valuable opportunities after the estimate leaves your business - and to keep delivery, questions, status, ownership, and outcomes visible.

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

Post-Estimate Follow-Up

Human Service. Smarter Systems.

What Should Happen After You Send an Estimate?

Sending the estimate should create the next expected step. Use this worksheet to define what happens after an estimate is sent, who owns it, how customer responses become visible work, and when the opportunity should advance or close.

EPISODE 27 CORE FLOW

ESTIMATE SENT → CONFIRM DELIVERY → FOLLOW-UP DUE → CUSTOMER RESPONSE → NEXT ACTION → CLOSE OR ADVANCE

DEFINE ONE COMPLETE FOLLOW-UP STANDARD

PROMPT	NOTES
Estimate Sent Date When did the proposal leave the business?	
Delivery Confirmation / Exception Did it reasonably reach the customer? What happens if delivery fails?	
Initial Follow-Up Timing When should the business re-engage if nothing happens?	
Follow-Up Owner Who owns the estimate until it advances or reaches a defined outcome?	
Preferred Contact Method Call, email, text, portal, or another channel?	
Customer-Defined Timeline Did the customer ask you to reconnect on a specific date or after a specific event?	
Current Status What is the estimate's present state?	
Waiting On Is the customer waiting on your team, or is your team waiting on the customer?	
Customer Questions / Revisions What open questions, revision requests, or new information need action?	
Next Action What should happen because of the customer's latest response or lack of response?	
Escalation Rule When does this estimate require attention beyond the normal follow-up process?	
Closure Rule When is an inactive or unresponsive estimate given a defined outcome?	

KEY WAITING STATE

- WAITING ON CUSTOMER - The business has completed its current action and is waiting for the customer.
- WAITING ON US - The customer has asked a question, requested a revision, or needs something from the business.

KASENCE FLOW INSIGHTS | EPISODE 27

Post-Estimate Follow-Up

Human Service. Smarter Systems.

THE KASENCE FLOW CHECK

PROMPT	YES / PARTLY / NO
1 When an estimate is sent, does your process automatically create a clear next review or follow-up point?	☐ YES ☐ PARTLY ☐ NO
2 Is there one clear owner responsible for the estimate until it advances or reaches a defined outcome?	☐ YES ☐ PARTLY ☐ NO
3 Can your business distinguish between estimates waiting on the customer and estimates where the customer is waiting on your team?	☐ YES ☐ PARTLY ☐ NO
4 When customers ask questions, request revisions, or provide new information, does that become visible work with ownership and timing?	☐ YES ☐ PARTLY ☐ NO
5 Does your business have a defined point where an unresponsive or inactive estimate is escalated, closed, or otherwise given a clear outcome?	☐ YES ☐ PARTLY ☐ NO

POST-ESTIMATE STATUS SNAPSHOT

- ☐ Sent
- ☐ Delivery Issue
- ☐ Follow-Up Due
- ☐ Waiting on Customer
- ☐ Waiting on Us
- ☐ Question Open
- ☐ Revision in Progress
- ☐ Approved
- ☐ Declined
- ☐ Stale
- ☐ Closed

BETTER PROCESS / BETTER FLOW

What should happen immediately after the estimate is sent?
Define the next review or contact point, owner, and expected timing.

How should customer responses change the workflow?
Define how questions, revisions, delays, approvals, declines, and no-response states create the next action.

FIRST IMPROVEMENT TO MAKE THIS WEEK

Choose one practical change that would make post-estimate ownership, timing, or status more reliable.

REMINDER

READY FOR A SECOND SET OF EYES?

Take the Kasence Flow Check at kasence.com/contact

Paid Lead Gap

Human Service. Smarter Systems.

Are You Paying Google for Leads Nobody Answers?

Paid advertising can create real customer intent - but the opportunity can still disappear after the click. Use this worksheet to trace actual paid leads and find where capture, ownership, response, or follow-up is breaking down.

EPISODE 28 CORE FLOW



TRACE A SAMPLE OF REAL PAID LEADS

PROMPT	NOTES
Advertising Source Which campaign, platform, or ad generated the lead?	
Date and Time When did the customer contact the business?	
Customer Contact Channel Call, form, message, chat, booking, or another channel?	
Business Hours / After Hours Did the lead arrive while the office was open or closed?	
Call Answered / Missed If it was a call, was it answered?	
Form / Message Captured Did the interaction become visible and recoverable?	
Acknowledgement Sent Did the customer receive a useful acknowledgement?	
Assigned Owner Who became responsible for the lead?	
First Human Response When did a person actually respond?	
Response Time How long did the customer wait?	
Next Action What action followed the first response?	
Appointment / Estimate Did the lead become a real next step?	
Final Outcome What ultimately happened?	
Reason Lost, if Known If the opportunity was lost, what was the actual reason?	

AFTER-HOURS CHECK

- IF YOUR ADS RUN AFTER HOURS - Can the customer leave useful information? Is the lead captured? Does the customer receive acknowledgement? Is there a defined owner and follow-up standard for the next business day?

Paid Lead Gap

Human Service. Smarter Systems.

THE KASENCE FLOW CHECK

PROMPT	YES / PARTLY / NO
1 Can your business identify every legitimate call, form, message, or booking generated by paid advertising - even when nobody responds immediately?	☐ YES ☐ PARTLY ☐ NO
2 Does every paid lead receive a clear owner and a defined response standard rather than relying on whoever happens to notice it first?	☐ YES ☐ PARTLY ☐ NO
3 If your advertising runs when your office is closed, is there a defined after-hours process for acknowledgement, capture, ownership, and follow-up?	☐ YES ☐ PARTLY ☐ NO
4 Can you distinguish between a genuinely poor-quality lead and a good opportunity that was lost because the business responded late, missed the call, or failed to follow up?	☐ YES ☐ PARTLY ☐ NO
5 Before increasing advertising spend, can you show what happened to the paid leads you already generated - from initial contact through final outcome?	☐ YES ☐ PARTLY ☐ NO

PAID LEAD STATUS SNAPSHOT

- ☐ Captured
- ☐ Missed Call
- ☐ After Hours
- ☐ No Owner
- ☐ Response Due
- ☐ Responded
- ☐ Qualified
- ☐ Not a Fit
- ☐ Appointment
- ☐ Estimate
- ☐ Lost
- ☐ Outcome Unknown

BETTER PROCESS / BETTER FLOW

Where is paid customer intent leaking?
Identify the most common gap: missed calls, after-hours inquiries, unassigned leads, slow response, inconsistent follow-up, or unknown outcomes.

What should happen immediately after every paid lead arrives?
Define capture, ownership, acknowledgement, response standard, next action, and escalation.

FIRST IMPROVEMENT TO MAKE THIS WEEK

Choose one practical change that reduces paid-lead leakage before spending more on advertising.

REMINDER

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

Process Leak

Human Service. Smarter Systems.

Your Ads Are Working. Your Business Process Isn't.

Marketing can create real demand while opportunities still disappear inside the business. Use this worksheet to trace real customer journeys, identify the first stage where movement stopped, and separate normal customer choice from preventable operational loss.

EPISODE 29 CORE FLOW

DEMAND CREATED → CUSTOMER ENTERS → RESPONSE → QUALIFY → MOVE FORWARD → OUTCOME

TRACE A SAMPLE OF REAL OPPORTUNITIES

PROMPT	NOTES
Lead Source Where did the opportunity originate?	
Entry Point Phone, form, email, text, scheduling, chat, referral, or another channel?	
Date and Time Received When did the customer first enter the process?	
Capture Did the opportunity become visible and recoverable?	
Owner Who became responsible for moving it forward?	
First Response What happened after the customer entered?	
Qualification Was the customer's need understood and the right path identified?	
Next Step What meaningful action should have moved the opportunity forward?	
Appointment Was an appointment, consultation, site visit, or similar step created?	
Estimate Was an estimate needed, created, delivered, and managed?	
Follow-Up Was the opportunity followed through the decision stage?	
Customer Decision What did the customer decide, if known?	
Final Outcome What ultimately happened to the opportunity?	
First Stage Where Movement Stopped Where did the process first stop moving?	

THE DIAGNOSTIC QUESTION

Do not start with: Why didn't they buy?
Start with: Where did the process stop? Then investigate why.

Process Leak

Human Service. Smarter Systems.

THE KASENCE FLOW CHECK

PROMPT	YES / PARTLY / NO
1 When marketing generates a lead, can your business trace that opportunity from initial contact through response, qualification, next step, and final outcome?	☐ YES ☐ PARTLY ☐ NO
2 Do you know where the largest number of potential customers stop moving through your process - or are you mainly measuring how many leads entered and how many sales came out?	☐ YES ☐ PARTLY ☐ NO
3 When an opportunity does not convert, can you distinguish normal customer choice from preventable issues such as slow response, missed follow-up, unclear ownership, handoff failure, or an undefined next step?	☐ YES ☐ PARTLY ☐ NO
4 Can your current intake, response, estimating, scheduling, and follow-up processes reliably handle the lead volume you are already generating?	☐ YES ☐ PARTLY ☐ NO
5 Before increasing advertising spend, have you identified the first major point in the customer journey where qualified opportunities are being lost?	☐ YES ☐ PARTLY ☐ NO

LOSS REASON CLASSIFICATION

- ☐ Not a Fit
- ☐ Customer Declined
- ☐ Competitor
- ☐ Price
- ☐ No Response
- ☐ Slow Response
- ☐ Missed Follow-Up
- ☐ No Owner
- ☐ Handoff Gap
- ☐ Estimate Gap
- ☐ Scheduling Gap
- ☐ Unclear Next Step
- ☐ Capacity Issue
- ☐ Outcome Unknown

BETTER PROCESS / BETTER FLOW

Where is the first major loss point?
Identify the first transition where qualified opportunities most often stop moving.

Can the current process handle existing demand?
Check response capacity, intake, estimating, scheduling, ownership, and follow-up before increasing traffic.

FIRST IMPROVEMENT TO MAKE THIS WEEK

Choose one practical change that improves the first broken transition before adding more advertising demand.

REMINDER

READY FOR A SECOND SET OF EYES?
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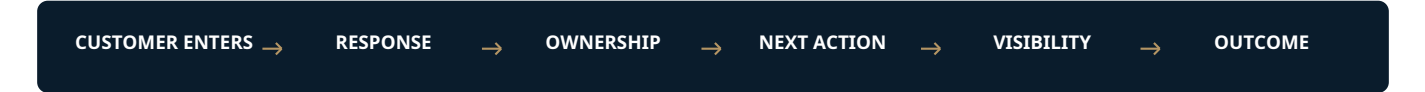
Hidden Leakage

Human Service. Smarter Systems.

Where Is Your Business Losing Customers Before You Notice?

Choose one real customer journey and trace what actually happened - not what the policy says should happen. The goal is to identify the few gaps creating the most customer friction, employee effort, or preventable revenue loss.

CAPSTONE FLOW



MAP ONE REAL CUSTOMER JOURNEY

PROMPT	NOTES
Entry Point How did the customer enter?	
Response What happened first, and how long did it take?	
Ownership Who was responsible at each stage?	
Handoffs Where did responsibility or information change hands?	
Next Action Was the next step clear after each major interaction?	
Customer Communication Did the customer know what was happening?	
Employee Friction What did employees have to manually remember, copy, search, chase, or reconstruct?	
Systems Which systems were involved, and where did information become fragmented?	
Visibility Could the business tell when the work was waiting, overdue, or stuck?	
Outcome What happened to the customer?	

PAY SPECIAL ATTENTION TO TRANSITIONS

Customer to employee / Employee to employee / Inbox to workflow / Website to CRM / Lead to appointment / Appointment to estimate / Estimate to decision / Decision to scheduling / System to system

Hidden Leakage

Human Service. Smarter Systems.

FINAL KASENCE FLOW CHECK

PROMPT	YES / PARTLY / NO
1 Can you trace one real customer from first contact through final outcome and clearly see every major response, handoff, owner, next action, and waiting point along the way?	☐ YES ☐ PARTLY ☐ NO
2 Where in that journey do customers or employees most often have to wait, repeat information, ask for status, manually reconnect work, or remember what should happen next?	☐ YES ☐ PARTLY ☐ NO
3 Can your business quickly identify open work with no owner, no next action, overdue activity, unanswered customer questions, or opportunities that have quietly stopped moving?	☐ YES ☐ PARTLY ☐ NO
4 Are your systems supporting a clearly defined customer process - or are employees using spreadsheets, inboxes, memory, duplicate entry, and manual checking to hold the workflow together?	☐ YES ☐ PARTLY ☐ NO
5 If you had to choose one process gap to fix first because it creates the greatest customer friction, employee effort, or preventable revenue loss, could you identify it from real operational evidence?	☐ YES ☐ PARTLY ☐ NO

OBSERVED GAPS

- ☐ Response
- ☐ Follow-Up
- ☐ Communication
- ☐ Ownership
- ☐ Handoff
- ☐ Administrative Friction
- ☐ System
- ☐ Visibility
- ☐ Revenue Leakage

BETTER PROCESS / BETTER FLOW

WHICH ONE SHOULD WE FIX FIRST?

Highest-priority gap: Evidence: Customer impact: Employee impact: Revenue / capacity impact: First improvement: How we will know it improved:

FIRST IMPROVEMENT TO MAKE THIS WEEK

Do not build a list of thirty problems. Pick the friction that matters most. Fix one important flow, measure whether it improved, then move to the next. Process improvement works better as a discipline than as a one-time cleanup project.

REMINDER
Do not build a list of thirty problems. Pick the friction that matters most. Fix one important flow, measure whether it improved, then move to the next. Process improvement works better as a discipline than as a one-time cleanup project.

READY FOR A SECOND SET OF EYES?
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