KASENCE FLOW INSIGHTS | EPISODE 05

Why Customer Requests Fall Through the Cracks

Human Service. Smarter Systems.

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

RECEIVED → ACKNOWLEDGED → ASSIGNED → IN PROGRESS → COMPLETED

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.	
2 **Does every open request have one accountable owner?** Name the one role or person responsible for moving it to the next outcome.	
3 **Can you distinguish a forwarded request from an accepted handoff?** Confirm that responsibility was accepted, not merely passed along.	
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.	
5 **What happens when a request is stalled, overdue, or unowned?** Define the review, reminder, reassignment, or escalation path.	

IF ONE ANSWER IS UNCLEAR:
The request may be moving through activity without moving toward an outcome.

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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

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