

Kasence First Contact & Ownership Worksheet

Human Service. Smarter Systems.

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.

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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.