

Does customer context move with the work?

Human Service. Smarter Systems.

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.	

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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