The Business Growth Brief

Better follow-up starts with a clear process

Automation can support inquiry handling when the team agrees on ownership, information and handoff.

A useful workflow has a human owner

When an inquiry arrives, the next steps should be visible: capture the details, understand the request, assign an owner and define the next action. Mapping that process often reveals a better starting point than choosing an AI tool first.

Routine tasks may be suitable for automation. A workflow can acknowledge receipt, route details to the right team member or create a reminder. The team still needs to decide how to handle unusual requests, scope discussions and situations that require judgment.

AI voice and chat assistants also need boundaries. Provide approved information, define the questions they can address and create a clear route to a person. Test the workflow with sample inquiries before relying on it for customer conversations.

Before you automate

- ✓ The inquiry process has an assigned owner.
- ✓ The service information is accurate and approved.
- ✓ The workflow collects only appropriate information.
- ✓ A person can handle uncertainty or failure.

QUICK ACTION Map what happens to one inquiry today. Identify a single repeated task your team would benefit from simplifying.

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A focused pilot before a larger rollout

01 Choose a narrow task

Start with a defined step such as an acknowledgment, routing rule or follow-up reminder. A limited scope makes the expected behavior easier to describe, test and review with the people who use it.

02 Connect the relevant information

Decide what the workflow needs to read and write. Review system permissions, approved service details and CRM fields. Keep ownership of customer information and access decisions clear.

03 Test normal and unusual cases

Try a complete inquiry, missing information, an unexpected request and a failed handoff. Check whether messages remain accurate and whether the right person receives the information needed to continue.

04 Keep reviewing the handoff

Ask the team whether the workflow saves useful effort and keeps the next action visible. Update approved information when services change. Expand the workflow only after the initial process works reliably for the team.

HOW WE CAN HELP

Required Marketing Group supports AI consultation, system setup, voice and chat assistants, CRM integrations, workflow automation and team training.

Book a consultation / (844) 978-1051