

Missed-call-to-CRM workflow audit

Use one recent unanswered leasing call. Mark a stage complete only when you can point to evidence in the real system.

Call or record ID

Audit date

Owner

1. Trace the seven-stage handoff

01 Eligible trigger ☐ Pass ☐ Gap

One eligible phone event launches one workflow; retries do not duplicate it.

02 Consent and stop rules ☐ Pass ☐ Gap

Suppression, opt-out, duplicate, and staff-ownership checks run first.

03 Approved first response ☐ Pass ☐ Gap

The copy identifies the team and offers one useful next step.

04 Minimum qualification ☐ Pass ☐ Gap

Only fields required for the agreed next action are captured.

05 Human escalation ☐ Pass ☐ Gap

Sensitive, uncertain, or policy-dependent cases leave automation with context.

06 Booked or assigned next step ☐ Pass ☐ Gap

A supported appointment is created or one named person owns a task.

07 CRM writeback and stop state ☐ Pass ☐ Gap

The record shows source, summary, owner, next action, and automation status.

Measurement tests whether these stages created an owned outcome; it is not an eighth workflow stage.

2. Name the five human gates

☐ Fair-housing or accommodation question

☐ Pricing, screening, lease, or legal interpretation

☐ Emergency, habitability, or safety concern

☐ Complaint, payment dispute, or interpersonal conflict

☐ Approval, low confidence, or an unverified action

Human handoff record

Escalation reason: _____

Named owner: _____

Context transferred: _____

Takeover timestamp: _____

Stop state confirmed: ☐

4. Close with six questions

1. Which stage caused the longest delay?
2. Where could automation make an unverified promise?
3. Which exception lacks a named owner?
4. Does the CRM show an outcome or only a transcript?
5. What event stops automation when staff take over?
6. Which metric can current data support reliably?

3. Measure completed handoffs

Metric	Formula and source
Provider acceptance time	Median provider-accepted time minus eligible-event time. <i>Phone + messaging receipt.</i>
Qualification completion	Replies with every required field ÷ replied eligible conversations. <i>Workflow + CRM.</i>
Booked or assigned next step	Qualified conversations with a supported booking or named task ÷ qualified conversations. <i>Calendar/task + CRM.</i>
CRM completeness	Audited records with source, timestamps, summary, owner, next action, and stop state ÷ audited records. <i>CRM audit.</i>
Unresolved exception rate	Escalations without ownership or resolution inside the target window ÷ all escalations. <i>Queue + CRM history.</i>

Decision

Biggest gap: _____

Named repair owner: _____

Target date: _____

Proceed / narrow / defer: _____

Operations framework, not legal advice or a performance guarantee. Have qualified counsel and providers review the rules that apply.

Need help mapping the first workflow?
[Book a 15-minute consultation](#)