Map the handoff.

A simple starting plan for a discovery-call enquiry. Adapt the example to your client.

01 **Entry rule**
Discovery-call enquiry form submitted in the intended client account

02 **Contact and opportunity**
Update the contact; use the agreed pipeline and duplicate rule

03 **Owner and fallback**
Assign the sales owner; route unmatched enquiries to the account manager

04 **First next step**
Send an appropriate enquiry confirmation and the correct booking link

05 **Exit and reply rules**
Check reply, booking and opt-out before each further follow-up; hand replies to the owner

06 **Exception handoff**
Create a visible human task for missing ownership, invalid details or an unavailable calendar

Decide before you build

Message permission and channel: _____
Sender and communication window: _____
Follow-up timing and fallback owner: _____

Stop On Response is one setting. Test bookings, opt-outs and other workflows separately. Use controlled test contacts; keep real customer data out of this worksheet.

Test all six paths.

Mark a check only after observing the expected behavior. A completed sheet is not a delivery guarantee.

☐ **1. A new enquiry reaches the right owner**

The intended client account contains the right records, owner and next step.

Observed / evidence: _____

☐ **2. A repeat submission follows your duplicate rule**

The documented repeat-enquiry behavior occurs without conflicting follow-up messages.

Observed / evidence: _____

☐ **3. A reply moves the conversation to a person**

The reply path stops or changes follow-up as designed, and the owner can respond.

Observed / evidence: _____

☐ **4. A booking ends contradictory booking prompts**

The correct booking is recorded and the lead does not receive another unnecessary booking prompt.

Observed / evidence: _____

☐ **5. An opt-out stops the relevant messaging**

The relevant messaging stops and the channel preference is respected.

Observed / evidence: _____

☐ **6. An exception has a visible fallback**

Someone owns the exception and can see what to do next.

Observed / evidence: _____

Release decision

Outstanding fixes: _____
Responsible owner: _____ Review date: _____

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