BIZTHRIVERS / FREE AGENCY RESOURCE

Own the next reply.

One inbox, one enquiry type. Define responsibility and coverage before adding more automation.

01 **Inbox, enquiry type and connected channel**

Decision / owner: _____

02 **Reply owner, backup and unassigned queue**

Decision / owner: _____

03 **Coverage window, timezone and review trigger**

Decision / owner: _____

04 **Handoff note, access and acceptance**

Decision / owner: _____

05 **Automation boundary, exceptions and closure**

Decision / owner: _____

Handoff note: question / promise / action / owner / due time

Keep responsibility with the current owner until the receiver accepts. The editable template adds a situation-to-owner matrix and the full six test actions. Use sample values and evidence locations.

Reply owner: _____ Backup: _____
Staffed hours / timezone: _____ Review date: _____

Test the handoff.

Expected results below; full test actions are in the web worksheet and editable template. Record observations.

01 New enquiry reaches an owner

The correct thread is visible to the intended operator, the reply owner is clear and the next action has a due time.

Result: Untested / Needs work / Passed Evidence / owner: _____

02 Backup accepts an absent-owner handoff

The backup can access the thread, acknowledges responsibility and understands the next action without sending a duplicate reply.

Result: Untested / Needs work / Passed Evidence / owner: _____

03 Unassigned and after-hours cases stay visible

An unmatched or outside-hours enquiry reaches the agreed review queue and owner, with a clear next staffed review time.

Result: Untested / Needs work / Passed Evidence / owner: _____

04 Internal note reaches only the intended team

The note is internal, intended team access is confirmed and the receiver knows how to find it; a mention is not treated as acceptance.

Result: Untested / Needs work / Passed Evidence / owner: _____

05 Human reply and automation agree

The observed automation follows the written reply rule, and the operator identifies any other active sequence before sending a message.

Result: Untested / Needs work / Passed Evidence / owner: _____

06 Closure, later reply and failure have an owner

Closure records the outcome; a later reply or failed send returns to an accountable owner with a recorded next action.

Result: Untested / Needs work / Passed Evidence / owner: _____

Operating decision and remaining fixes

Scope ready / Needs work: _____ Accepted by: _____
Fix / owner / retest: _____
Where to monitor unassigned and failed sends: _____