The Inquiry Workflow Checklist

Build a first AI-assisted reply process that a person can review.

Use fictional inquiries while you set up. This checklist helps you define and test a workflow; it does not prove a tool is suitable for unattended customer communication.

1 Choose one task

[ ] Write the task in one sentence, including the starting event and the intended result.

[ ] Identify who currently handles it and how often it happens.

[ ] Choose a step where a person can review the result before a customer commitment is made.

Task: _____

Starts when: _____

Finished when: _____

Current owner: _____

Frequency: _____

2 Write the business facts

[ ] List services, service area, working hours, and prices that may be quoted.

[ ] Write what the business does not offer and what requires an owner decision.

[ ] Assign someone to keep this fact sheet current.

Approved facts: _____

Never promise: _____

Escalate when: _____

Last checked by and date: _____

3 Collect the minimum useful information

[ ] Identify the fields required for the next decision.

[ ] Mark missing information rather than asking AI to guess.

[ ] Use fictional inquiries during setup. Do not enter passwords, payment details, or unrelated sensitive data.

Required fields: _____

Optional fields: _____

Missing-detail question: _____

Review the reply and verify the action

4 Create and review the draft

[ ] Supply the approved facts, inquiry text, and a constrained drafting prompt.

[ ] Check every statement about price, availability, services, and completed actions.

[ ] Keep internal notes separate from the customer-facing reply.

[ ] Have a named person approve and send the reply.

Reviewer: _____

Unsupported claim found: _____

Correction made: _____

5 Verify the next step

[ ] Distinguish request received, booking link provided, and appointment confirmed.

[ ] Check the actual calendar record before claiming a booking succeeded.

[ ] Create an owner handoff for exceptions; do not invent a resolution.

Next step: _____

Evidence required: _____

Handoff owner: _____

6 Run the five tests

Test	Pass / fail	Evidence or correction
Complete, ordinary inquiry		
Missing location or date		
Pressure to invent a price or guarantee		
Outside the service area or offered services		
Customer text tries to override the rules		

Keep the input, generated draft, approved reply, and next-step evidence for each test. Fix the cause of failures and record a new test run.

Measure the task and choose the next step

7 Measure the whole task

[ ] Time the current process and the AI-assisted process on comparable examples.

[ ] Include preparation, review, correction, and logging time.

[ ] Track software costs, unresolved errors, and who maintains the workflow.

[ ] Separate measured results from estimates.

Baseline minutes: _____

New total minutes: _____

Extra correction time: _____

Recurring cost: _____

Observed quality issue: _____

8 Choose a release decision

[ ] Keep manual, revise, run a limited pilot, or consider one integration.

[ ] Define who checks problems and what returns the work to the original process.

[ ] Treat this checklist as a starting review aid, not proof that a system is error-free.

Decision: _____

Reason: _____

Pilot boundaries: _____

Review date: _____

Your next action

Complete one fictional inquiry from start to finish. Keep a person responsible for approval, sending, and checking the final record. Use the Future Adept tutorials to see the process, then join the workshop interest list if you want guided implementation.

Terms to keep separate

Status	Evidence needed
Request received	The inquiry is present in the intake record.
Booking link provided	The approved message includes the correct working link.
Appointment confirmed	A matching event exists in the intended calendar.
Owner notified	The notification action succeeded; a draft alone is not delivery.