

MODULE 01

Workflow Implementation Brief

Complete this brief after finishing the module. It is the required output before moving to Module 2.

WORKFLOW IMPLEMENTATION BRIEF

COMPLETED EXAMPLE

Workflow name:

Customer Inquiry Triage Workflow

Business problem:

Website and email inquiries are read, sorted, and answered by hand. Replies can take most of a day, urgent service issues get buried behind routine questions, and the coordinator loses hours each week to copy-and-paste replies.

Primary user:

Office coordinator

Process owner:

Operations manager

Workflow trigger:

A new inquiry arrives through the website contact form or the shared inbox

Current process:

Coordinator reads each message, decides its type (quote, service issue, billing, general), forwards it to the right person, and types a reply adapted from old emails.

Current baseline:

Average first reply: 6 hours. About 1 in 10 inquiries is routed to the wrong person. Replies vary in tone and accuracy.

Time per run:

About 9 minutes per inquiry

Runs per week:

About 120 inquiries

Weekly manual time:

About 18 hours (120 inquiries × 9 minutes)

Quality/consistency problem:

Urgent service issues wait behind routine questions. Replies sometimes quote outdated prices or policies. No record of why an inquiry was routed where it was.

Version-one scope:

Classify web-form and inbox inquiries, draft a reply, and route to the right queue

Explicit exclusions:

No automatic sending of replies. No phone or social media inquiries. No non-English handling. No changes to the CRM setup. No price quotes.

Required inputs:

Inquiry text, sender name and email, source channel, approved FAQ and policy document, service-area list.

Primary output:

Inquiry category, urgency level, routing destination, and a draft reply that names the policy or FAQ it used.

Final destination:

Draft reply and category saved to the customer record in the CRM; urgent items also posted to the team chat channel.

Systems and tools involved:

Website form, shared inbox, CRM, automation platform, LLM, team chat.

Human approval points:

Coordinator reviews and edits every draft before it is sent. Operations manager approves any reply that mentions a refund or credit.

Dependencies:

Inbox and CRM access for the automation platform; an up-to-date FAQ and policy document; operations manager available for a weekly review.

Assumptions:

At least 85% of inquiries fit the four categories. The FAQ covers the most common questions. The team will start from drafts instead of writing from scratch.

Initial risks:

Wrong urgency on a safety-related issue. AI drafting from an outdated policy. Staff ignoring drafts if early quality is low.

Success criteria:

Measured over the first 30 days after launch and compared with the current baseline.

Time:

First reply in under 1 hour during business hours; coordinator time under 3 minutes per inquiry.

Quality:

90% or more of drafts sent with minor or no edits; zero replies quoting outdated pricing or policy.

Consistency:

95% or more of inquiries routed correctly; every reply follows the approved tone and format.

Business outcome:

Faster response to urgent service issues, and about 12 coordinator hours a week returned to scheduling and customer follow-up.

Target launch date:

Six weeks after this brief is approved