

Workflow Audit Summary

Scenario 1 | Service Enquiry-to-Commercial Closure



COMPANY TYPE

**Home Services / Air-conditioning
Maintenance & Repair**



BUSINESS TRIGGER

**Receipt of a qualified
service enquiry**



BUSINESS END POINT

**Closed - Paid or a
formal Closed Reason**



HIGHEST PRIORITY ISSUE

**Qualified enquiries
are not formally
recorded**



ROOT CAUSE

**No formal Enquiry
Intake Control**



**Phase 1 must complete the full loop from enquiry to
commercial closure - not only scheduling or invoicing
fragments.**

Current-State Workflow

Scenario 1 | Service Enquiry-to-Commercial Closure



STAR Real Case Analysis

HIGHEST-PRIORITY CASE

WhatsApp enquiry was read but not formally recorded



S Situation

On Monday, a customer enquired via WhatsApp about air-conditioning repair and requested service within two days.



T Task

Admin should create an Enquiry Record, assign an Owner, and set a Next Action.



A Action

While handling other scheduling work, the admin did not enter it in Excel and created no pending task or reminder.



R Result

When the customer followed up on Thursday, the omission was discovered, but the customer had already chosen another provider.

IMPACT



Lost opportunity

Lost potential order and revenue



Slow response

Delayed reply and poorer customer experience



Low visibility

No visual tracking or control



KEY INSIGHT

This was not a single employee mistake. It exposed insufficient process and system controls.

5 Why Root Cause Analysis

Tracing the surface problem to Operational, Detection and System Failures

1  WHY 1 Admin did not immediately enter the enquiry in Excel	 Operational Failure	 Establish Intake rules
2  WHY 2 The update was postponed while handling scheduling work	 Detection Failure	 Exception Queue + SLA
3  WHY 3 There was no Pending Intake queue or reminder	 System Failure	 Job Register as the operational source of truth
4  WHY 4 There were no unified Enquiry ID, Owner or Status rules	 Detection Failure	 Exception Queue + SLA
5  WHY 5 WhatsApp became the communication channel and the main work tracker	 System Failure	 Job Register as the operational source of truth



The root cause is the lack of structured Enquiry Intake Control - not simply an employee forgetting to update Excel.

System Environment & Priority Improvements

Current Environment + Bottleneck Priority

 WhatsApp USE Customer enquiries, quote communication, on-site updates and daily coordination. ROLE Frontline communication channel; retain it, but connect it to structured records.	 Excel USE Quotations, price lists, follow-ups and record consolidation. ROLE Temporary case and analysis tool; gradually reduce its role as the master database.	 Google Calendar USE Appointment scheduling, job scheduling and reminders. ROLE Scheduling and reminder source that must stay synchronised with process status.
 Local Accounting Software USE Accounting, general ledger, financial reports and tax. ROLE Financial system of record and reporting core; API integration is a medium-term objective.	 PayNow / Bank USE Collections, transfers, reconciliation and payment activity. ROLE Payment and reconciliation source; automate matching and status write-back.	 Job Coordination Layer USE Tasks, scheduling, assignment, status, progress and documents. ROLE Central operational layer and the single source of truth.

 PRIORITY IMPROVEMENTS 1 Qualified enquiries not formally recorded 2 Work Completed and Billing Ready are mixed 3 Scheduling / technician handover not synchronised 4 Payment follow-up depends on memory 5 Invoice and Job data do not match 6 Customer and Job records are mixed together	 SCORING (IMPACT x FREQUENCY) HIGH High impact, high frequency - Creates revenue, delivery or financial risk - Must be addressed in Phase 1 MEDIUM Medium impact, medium frequency - Affects efficiency and accuracy - Suitable for Phase 2 improvement LOW Low impact, low frequency - Limited impact; optimise later - Standardise the process first
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Full API integration with the local accounting system is not recommended as the first Phase 1 focus.

Recommended Phase 1 MVP & Next Steps

Service Enquiry-to-Commercial Closure MVP

Future-State End-to-End Workflow Map



PHASE 1 SUCCESS KPI (RECOMMENDED)

			
Qualified enquiry capture rate	Job completion data completeness	Completed-to-Invoice	Status consistency
>= 98%	>= 95%	< 1 working day	>= 95%



Recommended next step: complete the minimum viable closed loop first, then add reminders, exception management and analytics.