

Local-Service Lead Response and Booking Launch Pack

Build a safe test-environment path from captured enquiry through human-reviewed qualification and booking, with duplicate controls, explicit safety escalations, a visible action list, dry-run evidence, and launch, stop, and recovery instructions.

Course: <https://flowgrammer.ca/courses/local-service-lead-response-booking-system>

Complete one section after each lesson. Use permitted real or sanitized evidence when available. Keep fictional fixtures, unknown values, manual work, blocked routes, and human approvals clearly labelled.

1. Define One Service Lane and Baseline

A service-lane brief with scope, baseline definitions, human gates, prerequisites, and stop conditions.

A useful build begins with one customer path. Define what arrives, who owns the next decision, and what completed means before choosing software.

Decision, scope, and evidence used

Item or rule	Evidence / source	Unknown or failure action	Owner

[] One lane can be tested end to end. [] Automated and human response measures are separate. [] Every high-consequence condition has a human owner. [] A packaged-product or stop decision remains valid.

Result: pass, repair, manual, blocked, narrower scope, or stop, with the reason

2. Capture, Normalize, and Match Enquiries

An intake schema, source-of-truth map, stable IDs, duplicate policy, and missing-data path.

The original enquiry is evidence. Preserve it before normalization, and treat matching as a reviewable business rule rather than a convenient overwrite.

Decision, scope, and evidence used

Item or rule	Evidence / source	Unknown or failure action	Owner

[] The original message is retained. [] Unknown values never become false or negative. [] Uncertain matches require review. [] Repeated delivery cannot create repeated effects.

Result: pass, repair, manual, blocked, narrower scope, or stop, with the reason

3. Design the First Response and Consent Boundary

A response decision tree with allowed content, channel authority, hours, suppression, and fallbacks.

Speed is useful only when the response is appropriate, authorized, and connected to an owner and next action.

Decision, scope, and evidence used

Item or rule	Evidence / source	Unknown or failure action	Owner

[] The first response cannot make a safety or price decision. [] Channel authority is explicit. [] Opt-out changes future action. [] Failure creates an owned visible task.

Result: pass, repair, manual, blocked, narrower scope, or stop, with the reason

4. Qualify, Route, and Escalate

A qualification rubric, routing precedence, human review matrix, and unavailable-owner fallback.

Use simple, observable rules before advanced AI. Qualification prepares context; a person owns consequential service and relationship decisions.

Decision, scope, and evidence used

Item or rule	Evidence / source	Unknown or failure action	Owner

[] Unknown is not a disqualifier. [] Existing relationships are preserved. [] Safety and warranty decisions remain human. [] Everyone-away and failed-assignment states are visible.

Result: pass, repair, manual, blocked, narrower scope, or stop, with the reason

5. Offer Booking and Reconcile Changes

A booking-state map and test adapter for one appointment type.

A booking link is not a booked appointment. Record what the scheduler accepted and reconcile every later change with the lead state.

Decision, scope, and evidence used

Item or rule	Evidence / source	Unknown or failure action	Owner

[] A link click is not reported as a booking. [] Duplicate requests do not create duplicate appointments. [] Unknown scheduler outcomes remain unknown. [] Cancellation and no-show paths have owners.

Result: pass, repair, manual, blocked, narrower scope, or stop, with the reason

6. Build the Action Board and Failure History

A styled test action board and event history derived from the same fixture data.

An owner needs to see what requires action, not only a funnel total. Keep incomplete and failed work visible until a person resolves it.

Decision, scope, and evidence used

Item or rule	Evidence / source	Unknown or failure action	Owner

[] Failures cannot disappear from history. [] Counts name their unit. [] Every actionable card has an owner or escalation. [] Snapshot and live status are labelled accurately.

Result: pass, repair, manual, blocked, narrower scope, or stop, with the reason

7. Test, Hand Off, and Decide Whether to Launch

A Lead Response and Booking Launch Pack with test evidence, owners, stop controls, and an honest decision.

Run dry first and inspect saved state after every case. Workflow success does not prove that the right person, message, booking, or fallback exists.

Decision, scope, and evidence used

Item or rule	Evidence / source	Unknown or failure action	Owner

[] No production effect occurs during tests. [] Every critical case has evidence. [] Operator instructions cover failure recovery. [] The final status does not exceed observed proof.

Result: pass, repair, manual, blocked, narrower scope, or stop, with the reason

8. Capstone and critical gates

Grade the complete Local-Service Lead Response and Booking Launch Pack and choose the next operating decision.

Criterion	Missing	Partial	Decision-ready	Score

Criteria: One service-lane boundary; Traceable intake and source fields; Duplicate and unknown handling; Authorized first-response design; Qualification and human escalation; Booking lifecycle and idempotency; Action board and failure history; Safe test evidence; Runbook and honest launch decision.

Critical gates: no unsupported claim, no hidden external effect, no invented missing value, human decisions remain owned, and the tested status matches the evidence. Passing standard: at least 16 of 18 points with no missing critical gate.

Final decision, approver, limitations, rollback or stop route, and next review