

COMBINED REVIEW

Referral & Repeat-Customer Handling Review

Fixed price: \$119

Format: 5-page sample written report

Delivery: asynchronous

FICTIONAL SAMPLE - NOT A REAL CLIENT

Executive snapshot

Redwood Home Remodeling, a fictional residential remodeling company, is used to demonstrate how this service is delivered. Assess whether high-trust leads are recognized and routed with appropriate continuity.

Primary risk

Referral and repeat leads are not consistently recognized at intake

Best next move

Add explicit Referral and Repeat Customer flags at intake.

Evidence reviewed

Referral/repeat records; intake source fields; routing rules; recognition flags.

What this report does

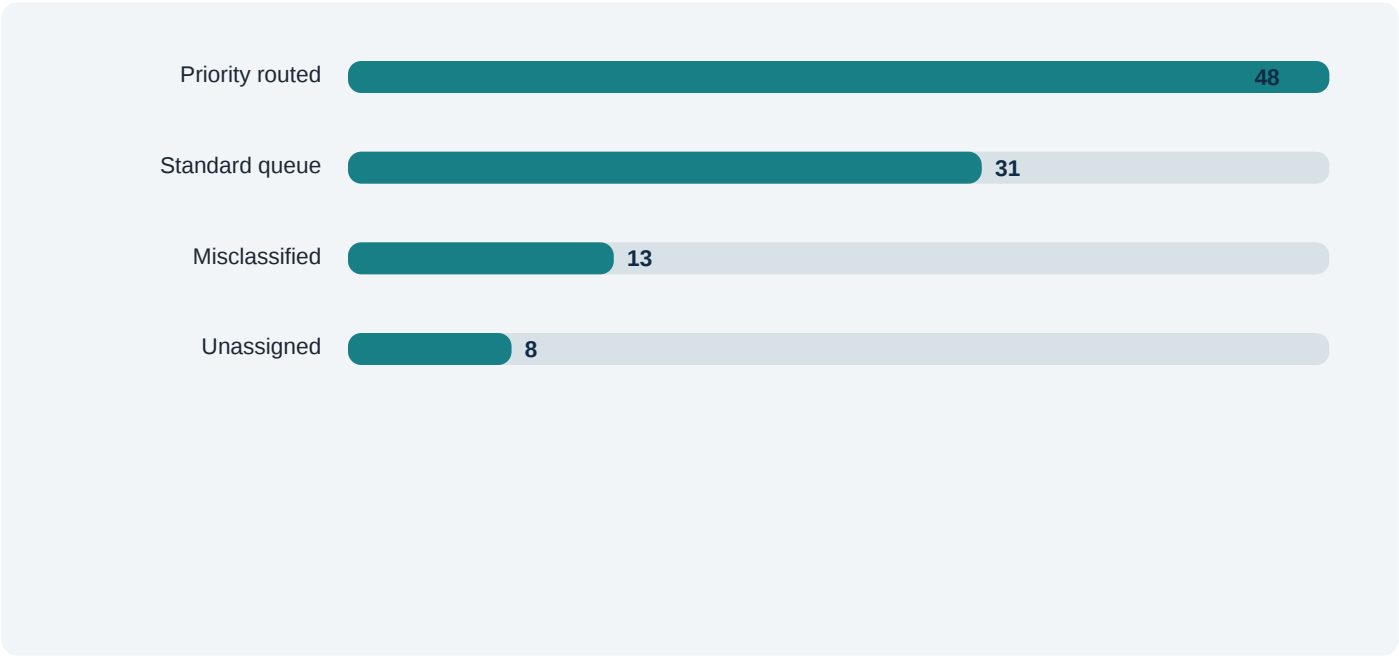
Converts the supplied evidence into prioritized operational actions without inventing ROI or revenue-loss claims.

SERVICE-SPECIFIC ANALYSIS

Current-state review

The sample analysis below uses synthetic records to show the type of evidence this service would evaluate for a real client. The numbers are illustrative, not benchmarks.

Illustrative operating data



Interpretation

Source detail is sometimes captured only in notes. They lose the continuity advantage they arrive with. Staff must search separate systems to recognize prior relationships.

PRIORITY FINDINGS

What deserves attention first

Priority reflects operational risk and controllability, not a claim about financial impact.

HIGH Referral and repeat leads are not consistently recognized at intake

Source detail is sometimes captured only in notes.

HIGH High-trust leads often enter the standard queue

They lose the continuity advantage they arrive with.

MEDIUM Repeat-customer history is not visible to the first responder

Staff must search separate systems to recognize prior relationships.

Control implication

The immediate objective is not to add complexity. It is to make the smallest number of controls visible, owned, and repeatable enough that the process can be managed consistently.

RECOMMENDED ACTIONS

30-day implementation rhythm

The sequence below is intentionally limited. Complete the control work in order, confirm adoption, and only then expand the process.

0-7 days	Add explicit Referral and Repeat Customer flags at intake.	Owner / manager
8-21 days	Route flagged leads to a priority queue with continuity ownership.	Process owner
22-30 days	Surface prior-customer context in the working record before first contact.	Manager review

Operating rules

- Assign one accountable owner for each action.
- Use a dated next action or review date.
- Measure only fields the team can maintain consistently.
- Do not add software or process complexity unless the current controls are actually being used.

NEXT-STEP ROADMAP

What to maintain, what to revisit

MAINTAIN	Keep the controls that are already producing reliable visibility. Do not change a working control simply to make the process look more sophisticated.
REVISIT	Review the high-priority finding after 30 days with the same evidence definition used in this report.
STOP / CLOSE	If the control is stable and the underlying question is answered, no additional paid service is required.
ESCALATE ONLY IF EVIDENCE SUPPORTS IT	A different service is appropriate only when a separate operational problem becomes visible outside this report's scope.

Limitations

This sample is illustrative. A real report would use only client-supplied or client-approved evidence, state any missing fields, and avoid unsupported conclusions.