COMBINED REVIEW

Web Form Capture & Routing Review

Fixed price: $129 **Format: 5-page sample written report** **Delivery: asynchronous**

FICTIONAL SAMPLE - NOT A REAL CLIENT

Executive snapshot

Northstar HVAC & Mechanical, a fictional HVAC service company, is used to demonstrate how this service is delivered. Connect customer-facing form friction with back-end routing and acknowledgement reliability.

Primary risk

Routing, not form completion, is the larger leak

Best next move

Reduce the form to fields required for routing and qualification.

Evidence reviewed

Current forms; required fields; confirmation copy; routing rules; sample submissions.

What this report does

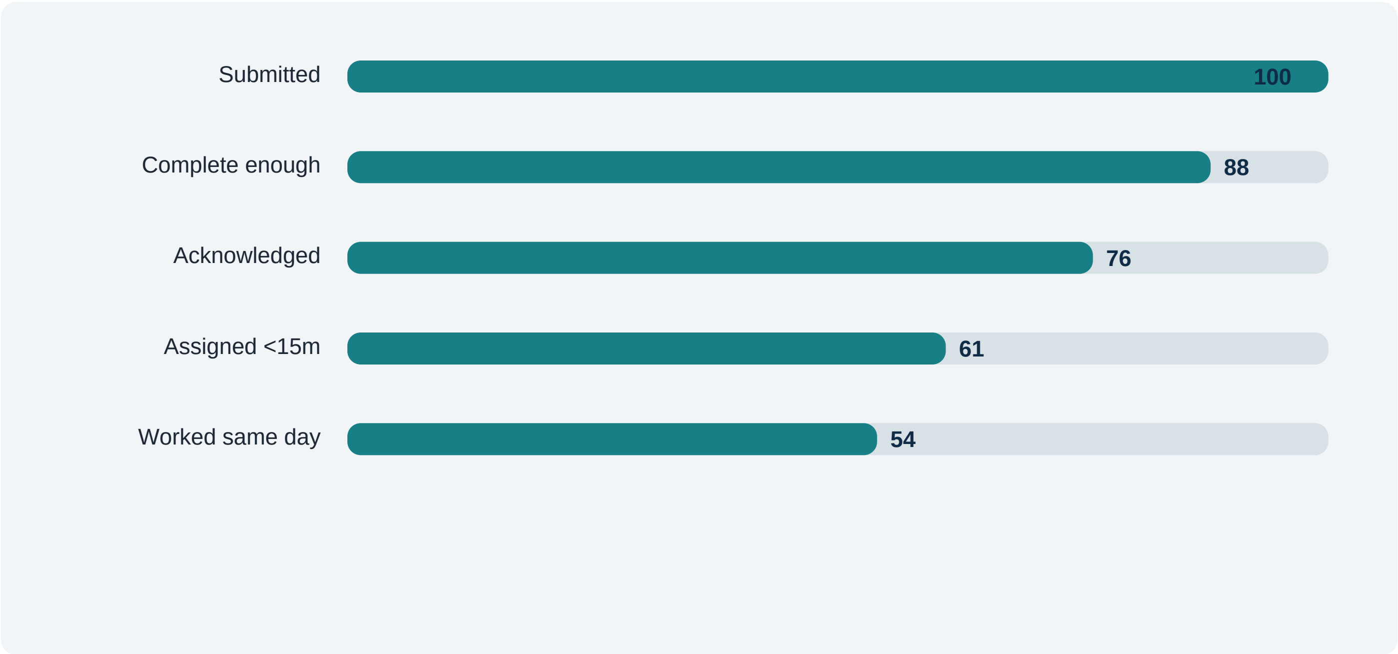
Converts the supplied evidence into prioritized operational actions without inventing ROI or revenue-loss claims.

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

Most forms contain enough information, but assignment is delayed. Some forms trigger confirmation; others leave the prospect unsure the request was received. Several fields are rarely used operationally.

PRIORITY FINDINGS

What deserves attention first

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

HIGH — **Routing, not form completion, is the larger leak**

Most forms contain enough information, but assignment is delayed.

HIGH — **Acknowledgement is inconsistent**

Some forms trigger confirmation; others leave the prospect unsure the request was received.

MEDIUM — **Too many optional fields add friction without helping routing**

Several fields are rarely used operationally.

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	Reduce the form to fields required for routing and qualification.	Owner / manager
8-21 days	Send immediate confirmation on every submission.	Process owner
22-30 days	Route to both a primary owner and backup with a 15-minute assignment target.	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.