



SAMPLE PILOT BRIEF / 01

One workflow. A result you can check.

Example: inquiry handling for a renovation business. This is a sample scope, not a client case study or a performance promise.

01 Define the workflow

Connect one agreed inquiry source to the existing CRM. Identify missing details, draft a reply, schedule follow-ups and record the next step. Check integration access before agreeing the scope.

02 Set the approval rules

Routine acknowledgements and requests for details follow agreed rules. Prices, commitments, complaints and refusals require a person. A detected reply or booking stops the follow-up sequence.

03 Measure before and during the pilot

Agree the baseline, observation period and success criteria first. Compare median response time, the share of eligible quotes followed up, and booked appointments. Record volumes and exceptions alongside the results.

04 Test, then hand over

Check duplicate replies, changed appointments, stop conditions and cases that need a person. Hand over the source code, configuration and operating guide. Decide whether to continue from the evidence.

THE DECISION AT THE END

Continue, adjust or stop - using the agreed criteria. A faster response is useful; it is not, by itself, proof of more sales.

Start with your real workflow.

Bring one anonymised inquiry and the name of your CRM to a free 20-minute workflow assessment.

[Book the assessment](#) / deeplogicworks.com