MANUAL vs AUTOMATED

DISTRIBUTION PROCESS

WHAT YOUR CURRENT STEPS MIGHT BE	HOW YOU COULD AUTOMATE THEM
Answering Phone or scanning entire email box for client request	Set up online form to receive request (We like Typeform!)
Interpret instructions over phone or email, something may not be complete and will require follow up	Request received via online form with specific instructions directly from client (elimitinates errors)
May not be doing this at all or may be tracking by manually inputting information on a spreadsheet	Create a line item to track status of request using google sheets, crm, etc.
One team member receives initial request (again likely via phone or email)	Send auto alert to team member(s) responsible via email, text, chat, task list, crm task, etc.
Team member processes request at assigned custodian	Team Member processes request at appropriate custodian
Once completed, if you are tracking the process, member marks as complete	Once completed, mark as complete in crm, spreadsheet, etc.
Manually enter the update in the CRM or email regarding the request.	Update automatically sent to CRM, Tracking Sheet, etc. to update with completion information entered by employee/team member
Manually call or email the client with whatever unique information is needed to confirm completion	Update sent to client via email or text letting them know their request has been completed along with unique information

AUTOMATION PROVIDES THE EFFICIENCY YOUR TEAM NEEEDS WITH THE ACCURACY YOUR CLIENTS EXPECT.