

Handover pack: enquiry sorting and draft replies

Sample document. The business, people and figures are fictional. We made them up to show what a Teknetik pilot handover pack contains.

What we built

This pilot puts option 2 from the sample review into practice: **sort enquiries and draft replies for approval**. It was built for the sample firm, a heating and plumbing business with 12 staff serving postcodes starting DN15, DN16 and DN17. Sam, the office manager, uses it every day.

The problem it addresses comes from the sample review. Its sample figures were 35 new enquiries a week and about 11 minutes of office time for each one. Four in 10 enquiries were missing a key detail, so someone had to chase the customer. Details were also typed into the job system by hand.

What the workflow does now:

- Every new enquiry, whether it comes by email, from the website form or as a voicemail transcript, becomes a job card in one approval desk. Anything missing is flagged. Website form enquiries arrive complete and need no AI at all.
- When details are missing, the desk offers a short AI draft (120 words at most) that asks only for those details. When nothing is missing, it offers the firm's standard acknowledgement instead. Replies must not include prices, quotes, visit dates or times, engineer names or guarantees, and fixed checks flag any that do.
- When the customer replies, their message joins the same conversation and the whole conversation is read again. Once every detail is there, the card is ready to book.
- If anyone mentions a gas smell or a carbon monoxide alarm, nothing is drafted. The card goes to the top of the queue in red, labelled "Safety: phone now", with the firm's fixed safety message.
- For each enquiry, Sam approves and sends the reply (editing it first if needed), rejects the draft or handles it personally. **No reply is sent and no job is created until a person approves it.**
- When an approved enquiry has every job detail, it becomes a record in the job system. Nobody retypes it.
- Invoice queries, complaints and existing jobs go straight to the manual queue for the office, with no draft. If the AI is unavailable or the workflow is paused, new enquiries go to the manual queue with the reason. Nothing is lost.

What it does not do: book visits, check the diary, quote prices, answer the phone, send anything on its own, or move or delete emails. The phone assistant (option 3 in the review) was deferred.

Where it runs. In a real pilot, everything runs in the firm's own accounts: its shared mailbox, its server or hosting, its model supplier account and its job system. We do not host it. In this sample, the inbox, outbox and job system are simulated inside the app, and nothing leaves the machine.

What's in this pack

DOCUMENT	WHAT IT COVERS	WHO SHOULD READ IT
00-overview	This page	Everyone

DOCUMENT	WHAT IT COVERS	WHO SHOULD READ IT
01-architecture	The parts, how data moves, where it is stored and which supplier sees what	The owner, your IT provider
02-access-inventory	Every account, key and permission, and when our access ends	The owner, your IT provider
03-runbook	Daily use of the desk	Sam and the cover approver
04-exceptions	What to do when something unusual happens	Sam, the owner
05-rollback	How to stop and return to the manual process in under five minutes	The owner, Sam
06-cost-estimate	Running costs at 35 enquiries a week	The owner
07-acceptance-review	The criteria agreed before the build, and the sign-off form	The owner, Teknetik
08-walkthrough	The 20-minute handover session	Everyone at the handover
09-test-results	Results of the last full test run, written by the app's test runner	The owner, your IT provider

Who owns what now

ITEM	OWNER FROM ACCEPTANCE	NOTES
The workflow and its settings	The firm: [named owner]	Decides on changes, pausing and retirement
Daily approval	Sam (office manager)	Cover approver: [named at handover]
The approved facts (what replies may say)	The firm: [named owner]	We make agreed changes under care or as quoted work
Shared mailbox and the app's permission	The firm	See 02
Model supplier account, billing and keys	The firm	In the firm's name and paid by the firm
Server or hosting	The firm	See 02
Job system and its API key	The firm	See 02
Code and documents	The firm	[as set out in the agreed terms]
Teknetik's pilot access	Removed at sign-off	Confirmed in 07
Monthly care (optional)	Teknetik, if taken	£150 a month, described below

Monthly care, if you take it, covers a health check, a review of exceptions and usage, and up to 90 minutes of support or small changes each month. We acknowledge requests within two working days during agreed

business hours. It is not a 24-hour or emergency service. Unused time does not roll over, and larger changes are quoted separately.

Next review

- **First monthly check:** [date agreed at acceptance]
- **Measured review against the baseline:** [date agreed at acceptance], after [number of weeks agreed] of real enquiries.
- **Review owner:** [named owner], with Teknetik.

The measured review compares like with like against the sample review's baseline. It looks at exceptions, costs and the office's experience, then decides whether to keep the workflow, change it or stop it. Stopping is a legitimate outcome.

Contacts

ROLE	WHO	HOW TO REACH THEM
Workflow owner	[named owner]	[contact agreed at handover]
Day-to-day approver	Sam (office manager)	[contact agreed at handover]
Cover approver	[named at handover]	[contact agreed at handover]
Teknetik	Carl Draper	carl@teknetik.co . Not an emergency line.