

ILLUSTRATIVE SAMPLE · NOT A REAL CLIENT

# New Enquiry Handling Review

## BUSINESS

Meridian Plumbing & Heating Ltd

## REVIEW DATE

May 2025

## ENQUIRY ROUTES REVIEWED

Phone · Website form · Email · WhatsApp

## SECTOR

Plumbing, Heating & HVAC

## PREPARED BY

Practical AI Labs

## JOB SYSTEM

Commusoft + Gmail/Sheets

This document is an illustrative sample produced by Practical AI Labs to demonstrate the format and depth of a paid New Enquiry Handling Review. Meridian Plumbing & Heating Ltd is a fictional business created for this example. All findings, observations and recommendations shown here are fabricated for illustrative purposes only and do not represent any real business, client engagement, or factual review.



## 01 - EXECUTIVE SUMMARY

# What this review found

This review examined how new enquiries reach Meridian Plumbing & Heating Ltd, how they are routed internally, and what happens between first contact and a confirmed booked job. The review covered four active enquiry routes, the current use of Commusoft, and associated email/WhatsApp processes.

# 4

**High-priority issues to address promptly**

# 5

**Moderate risks worth resolving within 30-60 days**

# 3

**Areas that appear to be working well**

**Overall picture:** Meridian appears to receive enquiries across four routes - phone, website contact form, direct email and WhatsApp - but there may be no single point of ownership once an enquiry comes in. Quote requests and boiler enquiries in particular could benefit from a defined follow-up process. The risk is not necessarily that enquiries are being lost, but that some may be stalling between first contact and a confirmed booking without anyone noticing.

## Three things worth addressing first

- ⚠ WhatsApp enquiries do not appear to be routed into Commusoft - they may be handled ad hoc on a personal device with no record or follow-up trigger
- ⚠ The website quote request form does not appear to have a defined response SLA or assigned owner - it could be unclear whose job it is to pick up and respond
- 💡 Boiler installation enquiries and emergency call-out requests appear to follow the same intake path - it may be worth checking whether the routing and urgency handling differ appropriately

## 02 - ENQUIRY ROUTES REVIEWED

# How new enquiries currently reach the business

The following routes were identified as active during the review period. Each was assessed for visibility, ownership, response process and integration with the job management system.

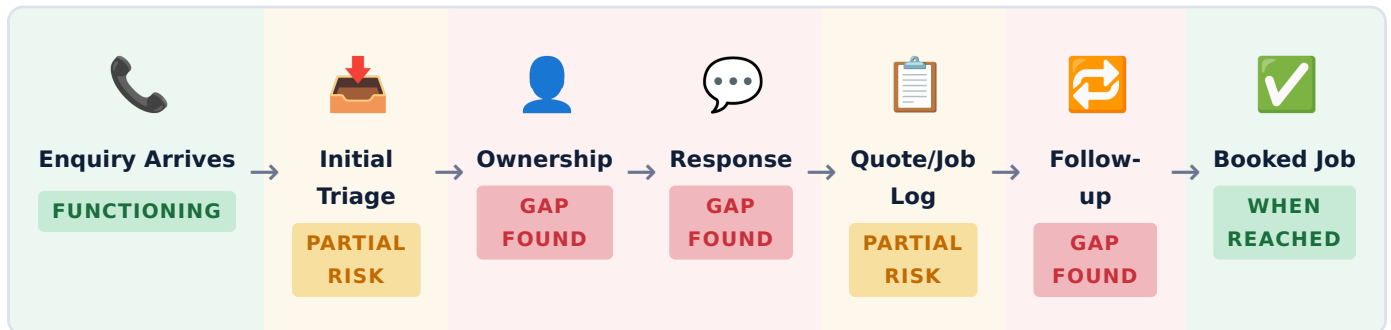
ENQUIRY ROUTE	CURRENTLY ACTIVE?	ROUTED TO COMMUSOFT?	CLEAR OWNER?	RISK LEVEL
Phone (main number)	Yes	Partially	Yes - office	Moderate
Website contact form	Yes	Via email only	Unclear	High
Direct email	Yes	No - manual only	Shared inbox	High
WhatsApp (personal number)	Yes	No	Ad hoc	High
Emergency out-of-hours	Informal	Not consistently	Varies by day	High
Online booking link	Not present	N/A	N/A	Not applicable

**Note on method:** This review was based on the information provided, the business website, visible enquiry routes and a structured walkthrough call. It does not include data from Commusoft reporting. Where information was not verifiable, cautious language is used throughout.

### 03 - ENQUIRY JOURNEY

## From first contact to confirmed booking

The map below shows the typical path a new enquiry follows through Meridian's current process, and where gaps or risks appear at each stage.



## Stage-by-stage observations

### **Ownership - no single intake owner for non-phone routes**

Phone enquiries appear to be handled by the office, but website form submissions, emails and WhatsApp messages do not appear to route to a named person or trigger a notification. When an enquiry arrives outside of a call, it may not be picked up promptly or at all if staff are on-site.

### **Response - no defined SLA or acknowledgement for form/email enquiries**

There does not appear to be an automatic acknowledgement sent when a website form is submitted or a direct email arrives. Prospects submitting a quote request may have no indication their enquiry has been received. This could affect perceived professionalism and may increase the chance of a prospect contacting a competitor while waiting.

### **Quote/Job Log - manual entry introduces delay and gap risk**

Enquiries that arrive via email or WhatsApp appear to require manual transfer into Commusoft. If this is not done consistently - particularly during busy periods or when engineers are handling calls - the job system may not reflect the true volume of active enquiries.

### **Follow-up - no apparent chase process for unanswered quotes**

Once a quote has been sent, it is not clear whether there is a defined process for following up if the customer does not respond. Quotes for larger jobs such as boiler replacements or service plan sign-ups may be sitting without a second contact. Even one or two recovered quotes per month could be commercially meaningful.

## 04 - RED FLAG FINDINGS

### Issues that may be costing enquiries right now

The following issues are flagged as higher priority because they affect the point at which an enquiry is most likely to stall or go cold - the first 30 minutes to 24 hours after contact.



#### **WhatsApp: no business account, no record**

WhatsApp enquiries are being received on what appears to be a personal device and number. There is no apparent record kept in the job system. If the enquiry is missed, there is no alert or follow-up process. This route appears to have no backup.



#### **Emergency route: informal and undocumented**

Out-of-hours and emergency enquiries appear to be handled informally. There is no clear published process on the website, no dedicated route and no consistent record. Emergency jobs may be among the highest-converting enquiry types - the handling process may be worth reviewing.



### Quote form: destination unclear

The website quote request form sends submissions to an email inbox. It is not clear whether this email is monitored in real time, assigned to a named person, or checked outside office hours. If a quote request arrives on a Friday afternoon, it may not be seen until Monday.



### Commusoft pipeline: stages may not reflect reality

Based on the walkthrough, some jobs in Commusoft may remain in early pipeline stages for longer than expected. If quote-stage jobs are not being progressed or chased, the pipeline view may not accurately reflect which enquiries are live versus stalled.

## 05 - FULL ENQUIRY HANDLING CHECKLIST

# Route-by-route assessment

### Phone enquiries

CHECK	STATUS	OBSERVATION
Is there a dedicated business number?	Yes	Main number visible on website and Google Business Profile
Is voicemail active with a clear message?	Unclear	Voicemail appears active but message wording was not confirmed
Are missed calls logged and returned same day?	Unclear	No confirmed process for logging or returning missed calls
Are phone enquiries entered into Commusoft?	Partially	Appears to depend on who takes the call - not consistent
Is emergency vs. planned job triaged on the call?	Informal	No structured call script or triage question set in use

### Website & email enquiries

CHECK	STATUS	OBSERVATION
Does the contact form send an auto-acknowledgement to the enquirer?	No	No confirmation email sent on form submission
Is the form submission routed to a named person or shared inbox?	Unclear	Goes to general inbox - no assigned owner or alert
Is there a target response time for form/ email enquiries?	No	No defined SLA observed
Are email enquiries logged in Commusoft?	Not consistently	

CHECK	STATUS	OBSERVATION
		Manual process - depends on individual staff action
Is there a separate route for commercial/ landlord enquiries?	No	All enquiries follow the same path regardless of job type

## WhatsApp, follow-up & booking handoff

CHECK	STATUS	OBSERVATION
Is WhatsApp used via a Business account?	No	Personal number in use - no business profile or auto-reply
Are WhatsApp conversations logged anywhere?	No	Not transferred to Commusoft or any shared record
Is there a quote chase process for outstanding quotes?	No	No defined follow-up step after quote is sent
Is there a booking confirmation sent to customers?	Yes - via Commusoft	Commusoft confirmation appears to be in use
Is engineer/appointment handoff logged in Commusoft?	Yes	Appointment allocation appears to be managed in the system

## 06 - PRIORITISED FIX PLAN

### What to address, in what order

The recommendations below are grouped by priority. "Fix Now" items relate to the parts of the enquiry path most likely to be causing stalled or missed enquiries. "Fix Next" items reduce risk and improve consistency. "Optional Later" items are improvements worth considering once the foundations are in place.

⚠️ FIX NOW	→ FIX NEXT	✓ OPTIONAL LATER
<p>⚠️ Assign a named owner for website form and email enquiries - one person responsible for checking and responding within a defined window</p>	<p>→ Define how emergency enquiries are handled out of hours and make this visible on the website</p>	<p>✓ Consider adding a self-service booking link for specific job types such as boiler servicing to reduce inbound call volume</p>
<p>⚠️ Set up WhatsApp Business on a business number with an auto-reply and a process for logging conversations</p>	<p>→ Create a consistent process for logging phone enquiries into Commusoft - not dependent on who takes the call</p>	<p>✓ Add a brief intake triage question set for phone calls to separate emergency, planned and quote jobs at first contact</p>
<p>⚠️ Add an auto-acknowledgement to the website contact form so enquirers know their message has been received</p>	<p>→ Set a pipeline stage convention in Commusoft so it is clear when a quote-stage job becomes stale</p>	<p>✓ Review whether a service plan renewal reminder workflow in Commusoft could be automated</p>
<p>⚠️ Create a basic quote chase process - even a simple 3-day reminder to follow up on sent quotes that have not been accepted</p>	<p>→ Consider separating commercial/landlord enquiries from domestic so they can be handled appropriately</p>	
	<p>→ Review missed call handling - confirm voicemail is in use and calls are returned within the same working day</p>	

## 07 - EXAMPLE IMPLEMENTATION SCOPE

# What "fixing this" could look like in practice

The items below illustrate the types of operational changes that could follow from this review. These are indicative examples only - actual scope would be agreed separately based on priorities.

## Illustrative implementation areas

- ◆ Set up WhatsApp Business account with auto-reply message and a simple handoff process to a shared inbox or Commusoft
- ◆ Configure a form submission notification or automation so new website enquiries are flagged to a named person in real time
- ◆ Create a quote follow-up process - either a manual reminder system or a simple automation trigger at 3 days post-quote
- ◆ Draft an out-of-hours emergency handling page or add a clear process statement to the existing website
- ◆ Define Commusoft pipeline stages and agree a convention for when a quote becomes stale and requires action

- ◆ Create a brief phone intake guide so all staff log new phone enquiries consistently regardless of call volume

Implementation is quoted separately from the review. Some items may be straightforward to address internally. Others may benefit from hands-on setup support. This review does not assume any particular implementation path - the aim is to give the business a clear picture of where the gaps are and what fixing them would involve.

## 08 - NEXT STEPS

# What Practical AI Labs would recommend from here

This review has identified the areas most likely to benefit from attention. Depending on your capacity and priorities, the next step would typically be one of the following:

### Option A - Address internally

Take the Fix Now items from Section 6 and work through them with your existing team or software. This review gives you a clear list. Practical AI Labs can answer follow-up questions at no extra cost.

### Option B - Hands-on implementation support

Practical AI Labs can set up the automations, workflows and processes identified in this review. Scope and fixed-fee pricing would be agreed based on the specific items you want to prioritise.

TO DISCUSS NEXT STEPS

[practicalailabs.co.uk](https://practicalailabs.co.uk)

[Book a Review - £397](#)