



CRM SCENE

SYSTEMS, EXPLAINED - FIELD WORKSHEET

FREE AUDIT

Customer Operations Handoff Audit

Find the handoff quietly breaking your operation - then choose the next 30-day fix.

USE THIS WITH ONE REAL CUSTOMER REQUEST

- 1 Map the outcome across systems and people.
- 2 Score eight control points from 0 to 2.
- 3 Identify the highest-risk failure pattern.
- 4 Commit to one measurable 30-day action.

CRM SCENE / CUSTOMER OPERATIONS SYSTEMS ARCHITECTURE

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Score the operating conditions, not the software features.

Choose 0 when the condition is missing or unreliable, 1 when it is partial or person-dependent, and 2 when it is explicit, tested, and visible.

CONTROL POINT	0	1	2	NOTES
Outcome The customer outcome and completion evidence are explicit.	☐	☐	☐	
Source of truth Each important fact has one authoritative system.	☐	☐	☐	
Decision authority The allowed decision-maker and boundaries are clear.	☐	☐	☐	
Readiness Dependencies are ready before routing or automation fires.	☐	☐	☐	
Ownership The next owner, action, and deadline are visible.	☐	☐	☐	
Visible state Every receiving system can see the current state.	☐	☐	☐	
Failure recovery Retries, alerts, fallback, and reconciliation are defined.	☐	☐	☐	
Human authority Escalation carries context, evidence, actions, and limits.	☐	☐	☐	
TOTAL SCORE ____ / 16	Do not average away a critical zero. Any zero touching money, identity, compliance, or customer harm requires an owner before further automation.			



Follow the request end to end.

Use a request that happened recently. Record the actual path, including workarounds and silent manual checks.

1. Outcome

What must be true for the customer and the business? What proves completion?

2. Entry and identity

Which channel receives demand? How is the person, account, order, or entitlement resolved?

3. Work and knowledge

Where is ownership coordinated? Which policy or answer source governs the response?

4. Transaction and decision

Which system executes the change? Who or what is allowed to decide?

5. Integration and automation

Which events move state? What must be ready before routing, AI, or automation acts?

6. Human handoff

What context, evidence, prior actions, and authority reach the person?

7. Closure

How are all systems reconciled, the customer notified, and the loop closed?



Look for transition failures that healthy dashboards miss.

Tick every pattern that appeared in the request or could occur without a tested control.

☐ **Duplicate identity**

The journey fragments because systems disagree about who the customer is.

Evidence / example: _____

☐ **Stale knowledge**

Policy changed but the answer source, macro, prompt, or help content did not.

Evidence / example: _____

☐ **Premature automation**

Routing or action occurs before required data or enrichment is ready.

Evidence / example: _____

☐ **Missing authority**

AI or a person can recommend an action but lacks a clear permission boundary.

Evidence / example: _____

☐ **Silent integration failure**

An event fails without a visible alert, retry, fallback, or reconciliation path.

Evidence / example: _____

☐ **Context loss**

The next owner receives the ticket but not evidence, reasoning, or prior actions.

Evidence / example: _____

☐ **Unclear owner**

The record has a status but no accountable next owner, action, and deadline.

Evidence / example: _____

☐ **Transaction mismatch**

CRM state suggests completion while the order, payment, or entitlement disagrees.

Evidence / example: _____

THE MOST CONSEQUENTIAL PATTERN

Why this one matters now: _____



Choose one fix that reduces risk and makes state visible.

Do not start with a platform rebuild. Rank the smallest changes that materially improve the customer outcome.

Candidate change	Risk 1-5	Impact 1-5	Effort 1-5	Owner

Priority rule: favour high-risk, high-impact work with a clear owner and evidence of completion.

30-DAY COMMITMENT

Outcome we will protect: _____

Control or handoff we will change: _____

Accountable owner: _____

Systems and teams involved: _____

Evidence that proves improvement: _____

Rollback or fallback if it fails: _____

Review date: _____



A score is useful only when it changes a decision.

0-6**FRAGILE**

Multiple handoffs depend on heroics, hidden checks, or untested assumptions. Protect the customer outcome before adding more automation.

7-11**PARTIAL**

The journey works in normal conditions but important responsibilities, state, or failure paths remain person-dependent.

12-16**CONTROLLED**

The operating conditions are explicit and visible. Validate them with failure tests and keep ownership current as systems change.

WHEN THE PROBLEM CROSSES SYSTEM BOUNDARIES

Customer Operations Systems Architecture Review

CRM Scene maps one priority journey, clarifies system responsibilities and decision rights, identifies control gaps, and turns the findings into a sequenced implementation plan.

Discuss your scorecard: crmscene.com/contact/

NOTES FOR THE REVIEW
