THE FLOW FIX

Focused Process Review

Fictional sample report for a small residential cleaning business.

PREPARED FOR	Alex — small residential cleaning business
PROCESS REVIEWED	New enquiry to confirmed booking
PREPARED BY	Atara | Flow State Business Blueprint
DATE	12 October 2026

Fictional sample — illustrates the review format, not client results. Alex runs a small residential cleaning business. In this case, offered times are not held, no expiry is stated and only confirmed bookings enter the calendar. The review covers new enquiries through booking confirmation.

01 AT A GLANCE

What this review found

The first priority is to make every pending enquiry visible without duplicating full conversations.

The process reviewed

From an enquiry arriving by Messenger, text or email to a confirmed clean being entered in the phone calendar.

The central issue

Pending enquiries have no consistent record of their status or next action. Alex uses unread messages and memory until a booking is confirmed.

Why it matters

One prospective client said they received no reply. Another replied to an offered time after it had been given to someone else, requiring more messages. Alex also reports answering enquiries at night. Frequency, time cost and lost bookings are not measured.

The recommended direction

Keep the existing channels and phone calendar. Use one brief pending-enquiry list, make the availability rule explicit and confirm the essential booking details before closing the enquiry.

02 CURRENT PROCESS

What is happening now

	STEP	WHAT HAPPENS
1	Receive enquiry	Messenger, text or email. Ask about location and the requested clean.
2	Check and offer	Check the calendar and, when needed, the other cleaner's availability. Send a proposed time.
3	Wait for reply	Offered times are not held. Only confirmed bookings enter the calendar.
4	Confirm booking	Enter the agreed booking in the phone calendar. Send details to the other cleaner if needed. An address may still need chasing.

Where friction appears

Unread messages do not distinguish waiting for the client from waiting for Alex. The offered-slot example shows a need for clearer availability handling. Addresses are sometimes still missing close to the clean.

What appears to be driving it

The gap is a missing control for unfinished conversations. Alex can see confirmed work in the calendar but has no equivalent view of enquiries awaiting action. An offered time stays available, yet that condition is not communicated. These are process gaps, not evidence that Alex needs a new booking system.

03 PRIORITY IMPROVEMENTS

The three changes that matter most

01 Keep pending enquiries visible

CHANGE Use a pinned phone note for open enquiries only. Each entry contains name, channel, next action and follow-up date. Update it after a meaningful exchange; remove it once booked or closed.

WHY The previous spreadsheet duplicated information. This note records the decision still needed, not the conversation, address, price or full job details. Those stay in the original message and confirmed calendar booking.

EXPECTED EFFECT Alex can identify who needs a response without treating unread messages as the task list. Begin and finish the working day with a short check of all channels and the note.

02 Clarify offered-slot availability

CHANGE Retain the existing no-hold approach. Explain that the time remains available until confirmed. Recheck the calendar when the client accepts, then confirm or offer another time.

WHY This fits the existing calendar routine and avoids temporary holds to maintain. It gives clients a clearer expectation. The tradeoff is that a late reply may still require a different time.

EXPECTED EFFECT An offered time and a confirmed booking have different meanings for both Alex and the client. Record a follow-up date in the pending note when an offer remains unanswered.

03 Confirm essential booking details

CHANGE Before marking an enquiry confirmed, check the date, time, address and agreed service. Send those details together in the client's existing channel.

WHY Addresses are sometimes chased before the clean. A consistent final check would catch missing information earlier.

EXPECTED EFFECT A clearer booking record and fewer last-minute requests for basic details.

04 RECOMMENDED WORKFLOW

A simpler way for the process to run

The proposed sequence keeps personal contact with Alex and makes pending work visible before it reaches the calendar.

	STEP	WHAT HAPPENS
1	Receive	Alex checks the existing enquiry channels at a chosen practical interval.
2	Capture pending work	In the pinned note, record name, channel, next action and follow-up date. Keep the conversation in its original channel.
3	Offer	Alex offers a suitable time and explains it remains available until confirmed. Set a follow-up date.
4	Confirm	On acceptance, recheck availability. Verify date, time, address and service; send the details and enter the calendar booking.
5	Close or follow up	A booking is confirmed when the client accepts, Alex rechecks availability, and the agreed date, time, address and service are recorded and sent together. Then remove the pending entry. If the client does not respond, use the recorded follow-up date and close the enquiry after a stated final check, rather than leaving it unread indefinitely.

What changes from the current process

Alex checks all enquiry channels at the start and end of the working day, adjusting the timing around cleaning jobs. After an exchange, update only the next action or follow-up date. At the final check, identify anything due next working day so it does not depend on an after-dinner inbox search.

What stays the same

Alex continues speaking with clients personally, using existing message channels and the phone calendar. The other cleaner receives the confirmed job details by text.

05 ACTION PLAN

What to do first

Start here

Review the current channels once and list the open enquiries in a pinned note. Done means each has an identifiable conversation, next action and follow-up date. Do not copy addresses, quotes or entire messages. Test on the next enquiry before adding any extra fields.

ORDER	FOCUS	ACTION
NOW	Pending visibility	Alex creates the pinned note. Done: every open enquiry has a next action and date.
NEXT	Availability rule	On the next offer, explain no hold and recheck on acceptance. Done: the client receives an explicit confirmation.
THEN	Complete details	Use the detail check on every booking. After two weeks, retain only fields Alex actually uses.

How to know it is working

During a two-week pilot, check whether every pending enquiry has a next action and whether booking details are complete at confirmation. Note enquiries discovered late and after-dinner booking administration. There is no baseline yet, so review the pattern rather than claim a saving.

06 SCOPE AND SUPPORT

Included support

A live Flow Fix includes a recorded walkthrough and one clarification email submitted within seven calendar days of delivery. No recording accompanies this fictional sample.

Scope of this review

This report is a focused operational review of the process named on the cover. It does not include implementation, software setup, automation builds, custom templates or tools, specialist advice, revisions, ongoing support or review of additional processes.