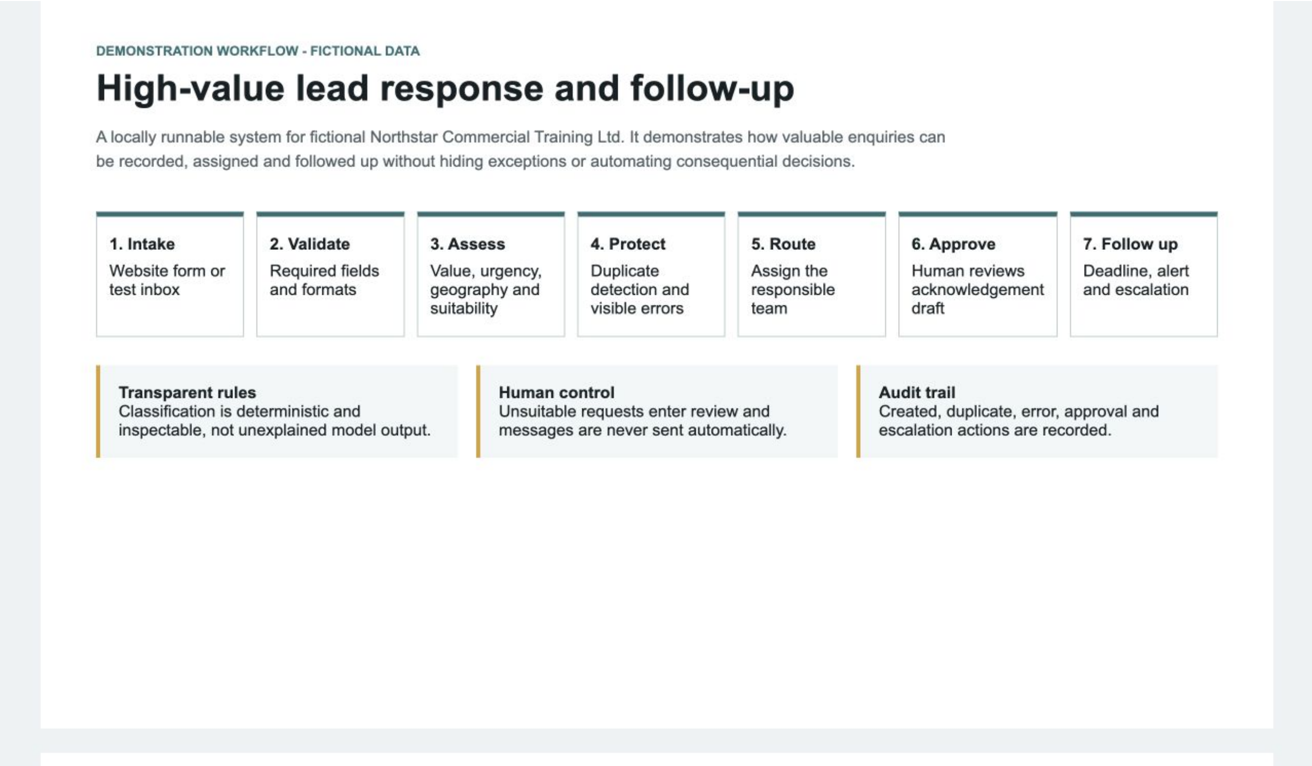
PORTFOLIO CASE STUDY

High-Value Lead Response and Follow-Up Workflow

A locally runnable demonstration for a fictional commercial training provider. It shows how valuable enquiries can be recorded, assigned and followed up while keeping exceptions, failures and human decisions visible.



Honest boundary: this is a demonstration using fictional data. It was not commissioned by a client, is not connected to live systems and does not claim revenue or conversion improvements.

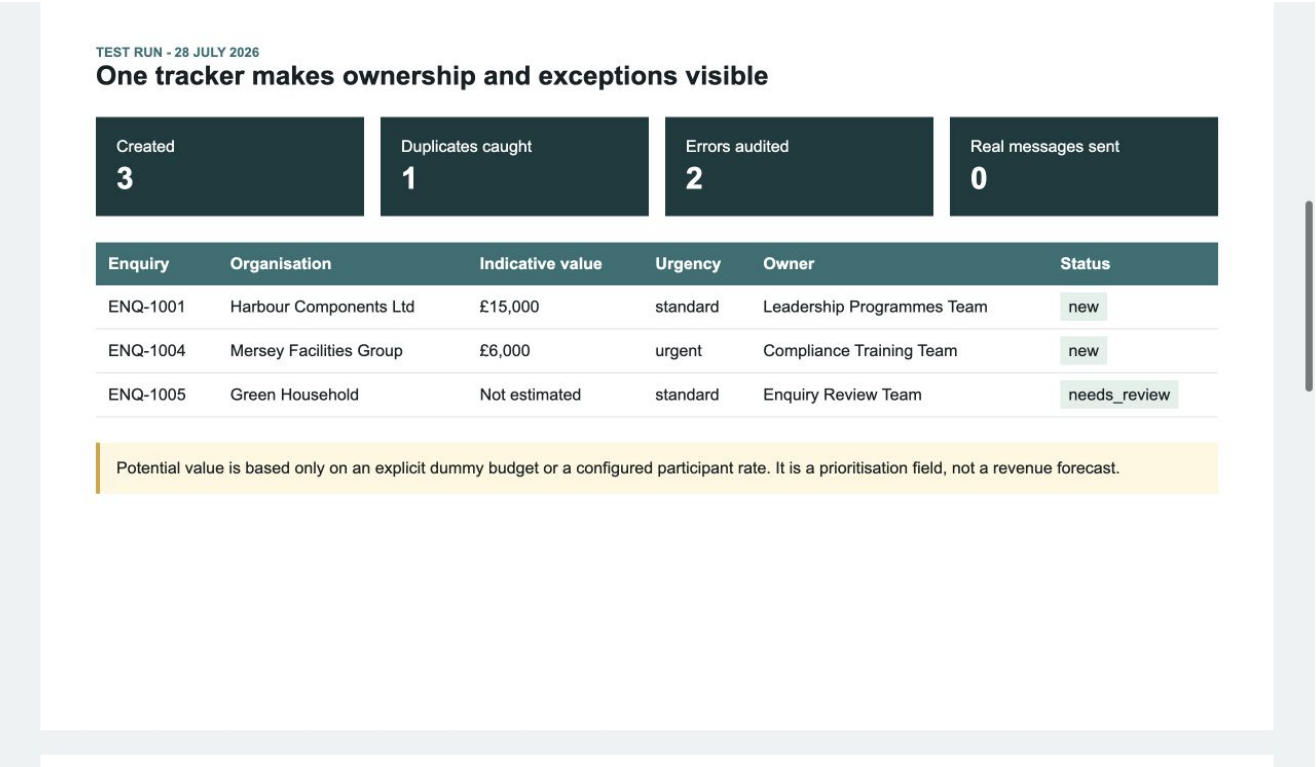
The business problem

Enquiries often arrive successfully but are then copied between forms, shared inboxes, spreadsheets and teams. Missing fields, unclear ownership, duplicates and overdue follow-up can remain invisible to managers.

TESTED IMPLEMENTATION

What the workflow demonstrates

Control	Demonstrated behaviour
Validation	Required fields, formats and positive numeric values are checked.
Transparent assessment	Urgency, geography and suitability use visible rules.
Value basis	Uses only explicit dummy budgets or configured participant rates.
Duplicate protection	Normalised email, organisation and course form the demo key.
Routing	The relevant team is proposed and stored with the lead.
Human approval	Acknowledgements remain pending until an authorised person approves.
Follow-up	Urgent and standard deadlines support overdue escalation.
Audit trail	Success, duplicate, error, approval and escalation actions are recorded.


TEST RUN - 28 JULY 2026

One tracker makes ownership and exceptions visible

Created	Duplicates caught	Errors audited	Real messages sent
3	1	2	0

Enquiry	Organisation	Indicative value	Urgency	Owner	Status
ENQ-1001	Harbour Components Ltd	£15,000	standard	Leadership Programmes Team	new
ENQ-1004	Mersey Facilities Group	£6,000	urgent	Compliance Training Team	new
ENQ-1005	Green Household	Not estimated	standard	Enquiry Review Team	needs_review

Potential value is based only on an explicit dummy budget or a configured participant rate. It is a prioritisation field, not a revenue forecast.

The deterministic test run processed six safe scenarios into three tracked leads, caught one duplicate and audited two errors. No real messages were sent.

Verification

RELIABILITY EVIDENCE

Normal and failure paths are both testable

Enquiry	Action	Outcome	Recorded at
ENQ-1001	process_enquiry	success	2026-07-28T10:00:00+00:00
ENQ-1002	process_enquiry	error	2026-07-28T10:00:00+00:00
ENQ-1003	deduplicate	duplicate	2026-07-28T10:00:00+00:00
ENQ-1004	process_enquiry	success	2026-07-28T10:00:00+00:00
ENQ-1005	process_enquiry	success	2026-07-28T10:00:00+00:00
ENQ-1006	process_enquiry	error	2026-07-28T10:00:00+00:00

11 automated tests cover validation, value basis, routing, duplicate protection, urgent deadlines, human approval, unsuitable requests, geography review, failure logging and overdue escalation.

11 automated tests passed. Coverage includes normal intake, incomplete data, duplicate handling, urgent deadlines, unsuitable enquiries, supported geography, explicit and configured value bases, human approval, processing failure and overdue escalation.

Before and after

PROCESS COMPARISON

What changes when the workflow is activated

Before

- Staff monitor separate forms and inboxes.
- Details are copied manually.
- Ownership depends on forwarding or memory.
- Duplicates and missing fields are inconsistent.
- Managers cannot easily see overdue enquiries.

After adaptation and activation

- Validated enquiries enter one tracker.
- Transparent rules propose an owner and deadline.
- Duplicates and processing errors are visible.
- Messages wait for authorised approval.
- Unactioned enquiries can be escalated with an audit trail.

This is a demonstration, not a deployed client system. Production work requires approved integrations, access controls, retention rules, client-specific acceptance tests and monitoring.

FROM DEMONSTRATION TO DEPLOYMENT

A controlled first engagement

The recommended starting point is a paid audit of one high-value enquiry workflow. The audit maps the current process, identifies failure points and produces a fixed implementation plan before credentials or live data are used.

> **Illustrative economics:** if an average completed project is worth £5,000, recovering one otherwise-lost suitable opportunity could exceed the implementation cost. This is an assumption, not a measured result.

Production requirements

A real implementation requires agreed field mapping, authenticated integrations, client-specific acceptance fixtures, access control, data retention, monitored failure notifications, backups, current third-party cost checks and an approved rollback plan. The first commercial step should be a paid audit of one workflow.

Suggested delivery sequence

1. **Audit:** map one enquiry path, owners, timing rules and failure modes.
2. **Build:** configure the agreed workflow against test accounts and fixtures.
3. **Acceptance:** test normal, duplicate, incomplete and failure scenarios.
4. **Activation:** enable live actions only after client approval and rollback checks.
5. **Handover:** provide operating notes, monitoring responsibilities and recovery steps.

> **Commercial starting point:** one workflow audit, delivered in three working days, with a process map, risk register and fixed-price build proposal.