

Customer Response *Recovery* Playbook

Pick one customer path. Recover it manually first. Install only the controls that prove useful.

THE PRACTICAL SEQUENCE

01

Choose one path

Start and finish it in plain language.

02

Recover manually

Use an owner, reply, tracker, and human gate.

03

Prove before install

Test routine, exception, and failure cases.

Inside: One-Path Card / 12-point score / four recipes / eight replies / honest math / manual SOP / installed blueprint / acceptance sheet / seven-day plan

NO EMAIL / NO LOGIN / PRINT-READY

Use it even if you never contact BLACK369.

The One-Path Card

Use one real customer moment. If the card needs a paragraph to explain, narrow the path again.

WRITE THE PATH

01

CUSTOMER MOMENT

Example: inquiry arrives after hours

02

PATH BEGINS WHEN

The observable trigger

03

RECOVERED MEANS

The next step is clear, owned, and recorded

04

SOURCE

Call / form / email / chat / checkout

05

NAMED OWNER + BACKUP

One person first; one backup

06

ACKNOWLEDGEMENT TARGET

Choose an honest target your team can keep

07

ONE CLARIFYING QUESTION

Ask only what unlocks the next step

08

HUMAN GATES

Money / promise / policy / sensitive / unusual

09

TRACKER + EVIDENCE

Where status, next due time, and outcome live

10-MINUTE START

1

Pick one repeated moment.

2

Pull five recent examples.

3

Name the next action and owner.

4

Choose one honest reply.

5

Mark every human decision.

6

Run it manually for seven days.

NARROW IT

Too broad: improve follow-up. Useful: after-hours website inquiries reach a named owner by 9:30 the next business day. The card describes a path, not a tool.

TEST WINDOW

Start date

Review date

Owner initials

DO NOT START WITH SOFTWARE

The 12-point response-path score

Give one point only when you can show the rule, owner, message, or log. Unknown scores zero.

RECEIPT + EXPECTATION

01

The customer can tell the request arrived.

☐ YES

02

The reply states what happens next.

☐ YES

03

The timing in the reply is honest and specific.

☐ YES

OWNERSHIP + TIMEOUT

04

One named person owns the next step.

☐ YES

05

A backup is named when the owner is unavailable.

☐ YES

06

An overdue case becomes visible without memory.

☐ YES

HUMAN BOUNDARY

07

Money, promises, policy, and unusual cases stop for a person.

☐ YES

08

The customer can ask for a person without starting over.

☐ YES

09

A person can take over without duplicate replies.

☐ YES

EVIDENCE + RECOVERY

10

Status, owner, next due time, and outcome are logged.

☐ YES

11

The team has tested routine, exception, and failure cases.

☐ YES

12

A weekly review can show what to keep, change, or stop.

☐ YES

TOTAL / 12

0-4

STABILIZE

Use an owner, saved reply, tracker, and daily review.

5-8

TIGHTEN

Fix the lowest section and repeat the manual test.

9-12

PROVE

Run the 12-case sheet before installing anything.

Four response paths you can run today

Each recipe has one trigger, one honest first reply, one human gate, one recovery step, and one log.

01

Missed inquiry

TRIGGER A real inquiry has no human response by the path target.

FIRST REPLY Confirm receipt. Ask service needed and timing. Name the next owner and due time.

HUMAN GATE Price, availability, promises, sensitive details, or unusual requests.

RECOVER Owner answers, books the next step, or closes the request with a reason.

LOG Received / acknowledged / owner / next due / outcome.

02

Quote follow-up

TRIGGER A quote was sent and the agreed check-in time has arrived.

FIRST REPLY Ask whether the quote arrived and which part needs clarity. Do not create urgency.

HUMAN GATE Any change to price, scope, terms, discount, or delivery promise.

RECOVER Owner answers the question, revises deliberately, or closes follow-up respectfully.

LOG Quote date / check-in / question / owner / outcome.

03

Booking rescue

TRIGGER A request started but no confirmation exists.

FIRST REPLY State clearly that booking is not confirmed. Ask which step blocked progress.

HUMAN GATE Time-slot confirmation, special conditions, deposits, refunds, or exceptions.

RECOVER A person confirms the booking or gives one clear next action.

LOG Started step / block / owner / confirmation / outcome.

04

Customer question

TRIGGER A question arrives without an approved, current answer.

FIRST REPLY Acknowledge it. Ask one detail only if it changes the answer. Give a due time.

HUMAN GATE Policy, safety, personal data, money, claims, or anything outside approved facts.

RECOVER Named person answers, links the current policy, or explains what cannot be confirmed.

LOG Topic / missing detail / source used / owner / outcome.

PATH RULE

Receipt first. One useful question. One honest due time. One named owner. No automatic commitment.

Replies 1-4: receipt, quote, and booking

Replace every bracket. Your team approves the timing, policy, and owner before use. These are drafts, not automatic decisions.

01

Missed inquiry acknowledgement

USE: A CALL, FORM, OR MESSAGE HAS NOT REACHED A PERSON

Hi [name] - thanks for contacting [business]. We received your [call / form / message]. What are you hoping to arrange, and by when? [owner] will review and reply by [honest time].

STOP

Do not promise price, availability, or a result.

APPROVED BY _____ DATE _____

02

After-hours receipt

USE: THE TEAM IS CLOSED BUT THE PATH IS MONITORED

Hi [name] - your message reached [business] after hours. You are not booked or confirmed yet. A person will review it by [honest time]. If timing matters, reply with the date you need.

STOP

Do not imply live support or confirmation.

APPROVED BY _____ DATE _____

03

Quote check-in

USE: THE AGREED FOLLOW-UP TIME FOR A SENT QUOTE ARRIVES

Hi [name] - checking that the quote sent on [date] reached you. Is any part of the scope, timing, or next step unclear? Reply with the part you want explained. [owner] handles any change to price or terms.

STOP

No false urgency. Route changes to the owner.

APPROVED BY _____ DATE _____

04

Booking rescue

USE: A REQUEST STOPPED BEFORE CONFIRMATION

Hi [name] - it looks like your request stopped before confirmation. You do not have a confirmed booking yet. Which step got in the way? [person] will confirm the next action by [honest time].

STOP

Only a person confirms a slot or exception.

APPROVED BY _____ DATE _____

BEFORE SEND

Correct name / correct channel / current facts / honest due time / named owner / unsubscribe or stop request honored.

Replies 5-8: questions, exceptions, and delays

Keep the message useful and short. One reply should not ask the customer to restate the whole story.

05

Customer question receipt

USE: AN ANSWER NEEDS A CURRENT FACT OR NAMED OWNER

Hi [name] - I received your question about [topic]. To give the right answer, can you confirm [one detail, only if needed]? [owner] will reply by [honest time].

STOP

Do not invent policy, stock, safety, or delivery facts.

APPROVED BY _____ DATE _____

06

Missing detail request

USE: ONE SPECIFIC FACT BLOCKS THE NEXT STEP

Before [owner] can review this, we need [single missing item]. Please reply with [safe format]. Do not send [sensitive information] here. Once received, the next update is due by [time].

STOP

Ask only for necessary, safe information.

APPROVED BY _____ DATE _____

07

Exception handoff

USE: THE REQUEST MAY CHANGE MONEY, POLICY, TIMING, OR A PROMISE

This needs a person because it may change [price / policy / timing / commitment]. I sent it to [owner]. No change is approved yet. Expect the next update by [honest time].

STOP

Never present an exception as approved.

APPROVED BY _____ DATE _____

08

Delayed response recovery

USE: THE RESPONSE TARGET WAS MISSED

Hi [name] - I am sorry this waited longer than our target. It is now assigned to [owner]. The next update is due by [honest time]. If you prefer no further follow-up, tell us and we will stop.

STOP

Do not hide the delay or blame the customer.

APPROVED BY _____ DATE _____

TONE RULE

Be clear, calm, and specific. Do not pressure, pretend, over-apologize, or add a promise the owner has not approved.

Exposure, owner time, and break-even

These screens support a decision. They do not predict recovery, revenue, or return on investment.

UPPER-BOUND EXPOSURE

Inquiries touching the gap x gross profit per won customer = exposure

Exposure is not lost revenue. Some cases would not buy, and not every weak handoff is recoverable.

01

Exposure screen

$A \times B \times C = \text{monthly exposure}$

A / QUALIFIED INQUIRIES PER MONTH

B / SHARE TOUCHING THE GAP

C / GROSS PROFIT WHEN WON

EXAMPLE ONLY

$40 \times 25\% \times \$120 = \$1,200$ monthly exposure.

DO NOT CALL THIS RECOVERED REVENUE

02

Owner-time screen

$\text{Cases} \times \text{minutes per case} / 60 = \text{owner hours}$

D / CASES HANDLED PER MONTH

E / OWNER MINUTES PER CASE

$D \times E / 60 = \text{OWNER HOURS}$

LOADED HOURLY COST, IF USED

EXAMPLE ONLY

$40 \text{ cases} \times 5 \text{ minutes} / 60 = 3.3 \text{ owner hours.}$

03

Break-even screen

$\text{Total test cost} / \text{gross profit per won customer} = \text{additional wins needed}$

SETUP COST

MONTHLY COST X TEST MONTHS

TOTAL TEST COST

GROSS PROFIT PER WON CUSTOMER

WINS NEEDED - ALWAYS ROUND UP

EXAMPLE ONLY

$\$600 \text{ total test cost} / \$120 \text{ gross profit} = 5 \text{ additional wins to break even.}$ Then ask whether five is plausible.

The recovery SOP before software

Run this with a shared inbox, saved replies, a simple tracker, and a named person. Keep every step observable.

OWNER

BACKUP

INBOX

TRACKER

DAILY REVIEW

STEP	WHAT THE PERSON DOES	WHAT GETS RECORDED	OWNER / TARGET
01 Capture	Create one tracker row as soon as the request is seen. Keep the original message linked or quoted.	Received time, source, customer, request.	Watcher / immediate
02 Acknowledge	Send one approved receipt. State the next owner and an honest due time. Make no commitment.	Reply used, sent time, next due.	Watcher / path target
03 Clarify	Ask one question only when the answer changes the next step. Do not ask the customer to start over.	Question, answer, missing item.	Owner / once
04 Human gate	Stop for money, promises, policy, sensitive information, risk, complaints, or anything unusual.	Reason, named approver, decision.	Approver / before action
05 Recover	Complete the next step or explain what cannot be confirmed. Give the customer one clear status.	Action, status, next due, owner.	Owner / agreed time
06 Log + review	Close the row with the outcome. Review overdue, duplicate, stopped, and exception cases each day.	Outcome, closed time, issue, learning.	Owner / daily

STOP THE TEST IF

A reply duplicates, a commitment skips approval, a customer cannot reach a person, or the tracker hides the next owner.

Capture -> acknowledge -> clarify -> human gate -> recover -> log

Install only after the manual SOP works. The installed system should make ownership and exceptions easier to see.

Input	Known action	Human decision	Visible output
01 Capture	SYSTEM ACTION Create one case from an approved source; preserve the original message and received time.		PROOF Case ID / source / timestamp / safe contact.
02 Acknowledge	SYSTEM ACTION Send the approved receipt with the next owner and due time. Suppress duplicates.		PROOF Message version / sent time / next due.
03 Clarify	SYSTEM ACTION Ask one approved question only when required data is missing. Keep the case linked.		PROOF Question / answer / confidence / status.
04 Human gate	SYSTEM ACTION Pause money, promise, policy, sensitive, complaint, low-confidence, and unusual cases.		PROOF Gate reason / approver / decision / time. CANNOT BE BYPASSED
05 Recover	SYSTEM ACTION Complete the approved next action, or hand control to the named owner with full context.		PROOF Action / customer status / next due / owner. PERSON OWNS OUTCOME
06 Log	SYSTEM ACTION Close or reopen the case. Surface overdue, duplicate, failed, and exception cases for review.		PROOF Outcome / latency / error / learning.
MINIMUM DATA	Case ID / source / received / reply / owner / next due / gate / outcome. Collect no extra sensitive data just because the system can.		

Blank 12-case acceptance sheet

Write the input and expected path before each run. Use eight routine, two exception, and two failure cases.

Test version

Tester

Date

Pass only when the actual path matches the expected path and manual takeover works.

#	CLASS	SCENARIO / INPUT	EXPECTED PATH	ACTUAL / NOTES	PASS
01	ROUTINE				☐
02	ROUTINE				☐
03	ROUTINE				☐
04	ROUTINE				☐
05	ROUTINE				☐
06	ROUTINE				☐
07	ROUTINE				☐
08	ROUTINE				☐
09	EXCEPTION				☐
10	EXCEPTION				☐
11	FAILURE				☐
12	FAILURE				☐

SUGGESTED RELEASE RULE

All 12 pass / each exception reaches the named person / failures are visible / duplicate sends are blocked / takeover preserves context.
Decision: ☐ RELEASE NARROW ☐ FIX + RETEST ☐ KEEP MANUAL

Seven days to a narrow, tested recovery path

Use tools you already have. The goal is evidence and control, not a broad transformation project.

DAY 1	Observe	Pull five recent cases. Mark source, wait, owner, next action, and where each case went quiet.	PROOF Five examples	☐
DAY 2	Define	Complete the One-Path Card. Choose one owner, backup, timing target, and every human gate.	PROOF Signed card	☐
DAY 3	Approve	Edit the relevant replies. Confirm facts, tone, due times, stop requests, and approval names.	PROOF Approved replies	☐
DAY 4	Run manual	Use the recovery SOP for every case in the narrow path. Review the tracker at a fixed time.	PROOF Visible tracker	☐
DAY 5	Test	Run the 12 cases: eight routine, two exception, two failure. Fix the path and rerun changes.	PROOF Acceptance sheet	☐
DAY 6	Launch narrow	Use one source or small traffic slice. Keep the owner watching duplicates, delays, and gates.	PROOF Daily notes	☐
DAY 7	Decide	Compare the score, math, owner time, acceptance results, and customer clarity. Keep, fix, wait, or skip.	PROOF Written decision	☐

WEEK RULE

Stop if customers receive duplicates, commitments bypass approval, or manual takeover becomes harder. A wait or skip decision is valid.

A completed Path Card and decision

Worked example only: a small service team handling after-hours website inquiries. Replace every assumption with your facts.

CUSTOMER MOMENT

After-hours website service inquiry arrives.

PATH BEGINS

Contact form is submitted after 6 PM.

RECOVERED MEANS

A person confirms the next step or closes the request with a clear reason.

SOURCE

Website contact form; original submission stays linked.

OWNER + BACKUP

Service coordinator; backup: duty manager.

EXAMPLE TARGETS

Receipt within 15 minutes; human review by 9:30 next business day.

CLARIFY

Which service do you need, and what date matters?

HUMAN GATES

Price, availability, scope, safety, exceptions, complaints.

MANUAL CONTROL

Saved receipt + shared tracker + 9:00 AM queue review.

LOG + TEST

Received, sent, owner, next due, gate, outcome; seven-day test.

DECISION / BUILD ONE CONTROL

Run the manual receipt + tracker first. Do not auto-quote or auto-book. Install only if the 12 cases pass and the path remains easier to take over.

WHY The path is narrow, the owner can be named, and the first control is reversible. Real case data and a passed acceptance sheet are still required.

OPTIONAL / 48-HOUR PUBLIC-PATH DECISION

Want an outside read before you build?

Submit one public URL for a written Build / Fix / Wait / Skip decision within 48 hours. No login credentials or private customer data.

[BLACK369.COM](https://black369.com)

[READ MY PUBLIC PATH](#)