

Voice launch week

Your team uses what is already live. This guide helps the owner, front desk, and on-call staff turn real conversations into clean handoffs. ED owns technical launch and testing.



USE THIS WHEN

A new week starts, staff change, a shift changes, or a real caller shows you something worth recording.

DO NOT USE IT TO

Run fake emergencies, prove acceptance, rewrite prompts, or make technical changes. Use the agreed support route for those.

02–03 / Start the shift

Use the quick map and name the person who owns today’s handoffs. Read the approved route instead of inventing one.

06–07 / Handle a change or concern

Let the owner decide cover. Give ED the smallest safe fact about unusual behavior.

04–05 / Handle real callers

Find the current record, agree the next action and respect the caller’s contact choice.

08 / Set a normal rhythm

Keep the decision and owner visible. Ask for a change only when real work gives a reason.

Week / location / time zone

Handoff owner / approved contact route

Make live work easy to find

The system handles calls. People own the next action, the promise and the customer’s changing needs.



A week of useful work, not a test lab.

Start with real work already arriving. Mark what belongs to the team, what belongs to ED, and what needs a safe handoff.

MOMENT	TEAM ACTION	RECEIPT
Start of shift	Read the approved roster and open the incoming list.	Named owner for each item
During calls	Speak clearly, confirm consent for callbacks or texts, and capture approved fields.	One usable record
Handoff	Sort by urgency and next action. Do not create a second private list.	Time + owner + route
Unusual behavior	Record a redacted excerpt or approved event detail. Use the restricted support route.	Short, safe note
End of week	Keep the routine that helps. Ask ED about product changes or technical patterns.	Normal operating rhythm

Real caller
Need, consent, callback

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Clean record
Approved fields only

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Named handoff
Owner, timing, next action

Boundary: No arbitrary weekly quota. The goal is reliable work and useful decisions, not a scoreboard.

Two normal examples

A caller asks for a new time: update the same record and let the owner confirm the window. A holiday changes staffing: record the approved hours and send the routing request to ED. Neither case needs a new test call.



Everybody owns a different part.

Put the work in the lane where it can be completed. Technical changes stay with ED. Customer context stays with your team.

OWNER

- Keep approved hours, holiday rules, and escalation contacts current.
- Decide who can receive a callback or appointment.
- Choose the approved restricted route for support.

FRONT DESK

- Use the live incoming list.
- Confirm name, callback, need, and consent.
- Assign the next action before moving on.

ED

- Own technical launch, system testing, and changes.
- Investigate patterns from safe reports.
- Explain what changed and what staff should do.

DECIDE

Owner confirms

CAPTURE

Staff records

CHANGE

ED implements

TODAY'S HANDOFF OWNER

Name / role / coverage

QUESTIONS FOR ED

Pattern, time, record ID, safe excerpt

Who answers which question?

The owner answers “May we promise this?” Staff answer “What did this caller need?” ED answers “What needs changing in the system?” Keep those decisions separate so a desk guess does not become a live setting.

Business choices before settings

Tell ED the outcome you want and who approved it. ED owns the technical change and its verification.



One list. One owner. No duplicate chase.

Use the actual incoming list your team already trusts. Before creating a new item, search by the approved identifier and check for an open next action.



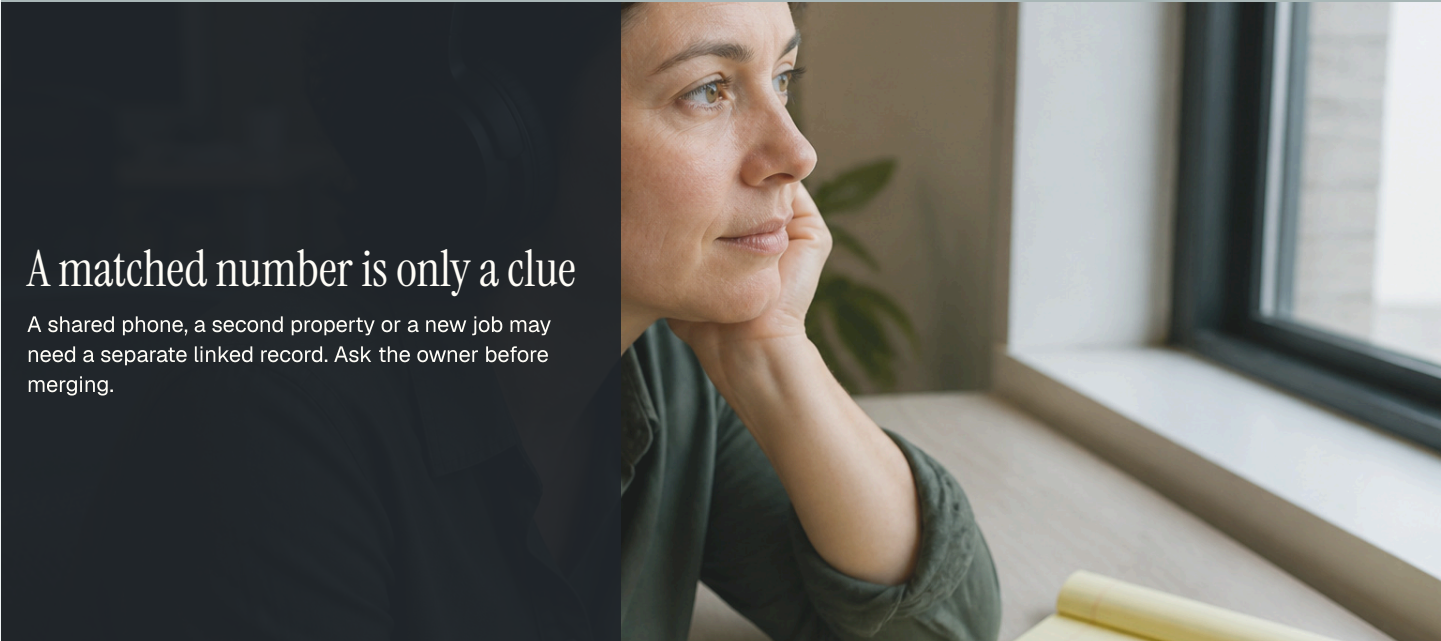
INCOMING ITEM	EXISTING RECORD?	NEXT ACTION + OWNER	DUE / WINDOW

Useful duplicate clue

Same callback number, same stated need, or an open next action. Confirm before merging or changing anything.

Do not guess.

If the right field or route is unclear, pause the handoff and ask the owner or ED. Do not create a second workaround list.



Say what is happening. Ask what is allowed.

A working voice system still needs human judgment. Keep the caller's expectations and consent visible to the next person.

01 Orient

"I can help get this to the right person." State the business and the next step in plain language.

02 Clarify

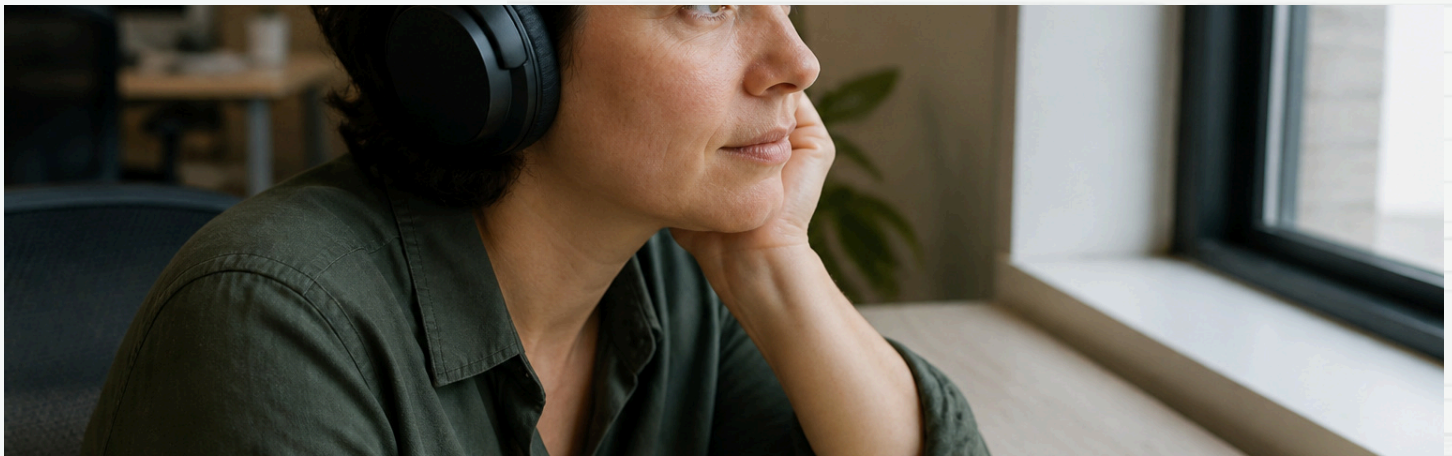
Capture the caller's stated need. Ask only for fields your approved workflow uses.

03 Consent

Before a callback or text, confirm the number, permission, and a reasonable contact window.

04 Close

Repeat who owns the next action and what the caller should expect. Do not promise a time the team has not approved.



PHRASE TO KEEP

"I have your request and the next step is with [role/name]. Is this the best number and time to reach you?"

RECORD AFTER

Name, callback, need, consent, owner, next action. No raw recording or private attachment.

Known

The owner accepted the next action. Give the approved window, not a guess.

Not known yet

Say the window is not confirmed. Name who will decide it and the allowed update route.

Read the approved roster. Change the route through the owner.

Staff can notice a coverage change. The owner confirms the approved roster. ED makes technical changes when the owner requests them.

SHIFT START

Read

Who is covering, for which window, and which queue?

GAP FOUND

Mark

Write the time, list location, and missing handoff. Do not silently edit routing.

OWNER DECISION

Route

Owner confirms the change. ED applies technical updates.

COVERAGE WINDOW	APPROVED PERSON / ROLE	BACKUP	CONFIRMED BY

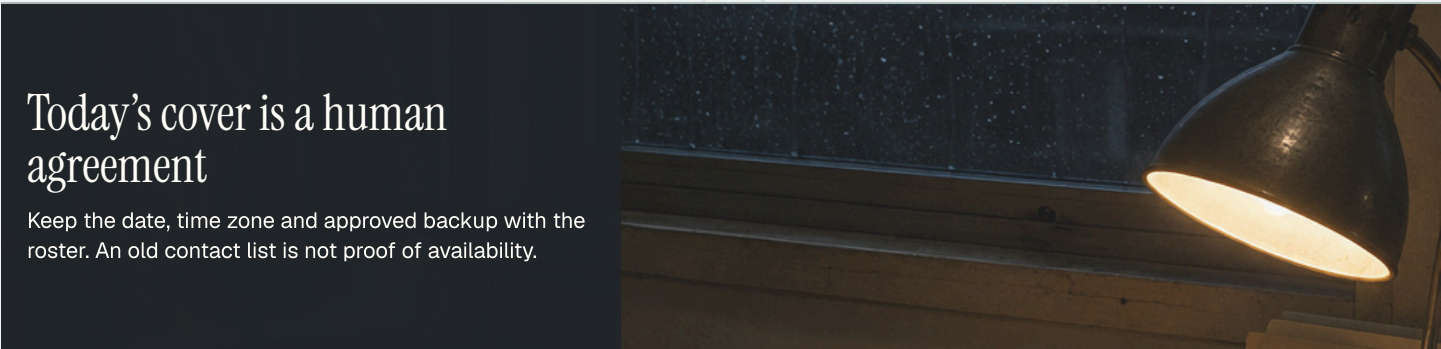
HOLIDAY / CLOSURE NOTE

Approved date, hours, owner

SAFE BOUNDARY

Never paste credentials, reset URLs, access codes, or private screenshots into a roster or support note.

At handoff: say the coverage window, the named owner, the backup, and where the approved roster lives.



Report the smallest useful fact.

A safe report lets the owner and ED investigate without spreading sensitive data. Use an approved restricted route and a redacted excerpt only when needed.

INCLUDE

- ☐ Approximate time and channel
- ☐ What the caller needed, in plain words
- ☐ Expected next action and observed result
- ☐ Record or event identifier, if approved

LEAVE OUT

- ☐ Raw call recordings or email attachments
- ☐ Credentials, codes, reset links, private screenshots
- ☐ Unnecessary customer details
- ☐ Speculation stated as fact

If there may be active harm

Skip routine checks. Use the agreed pause and escalation route immediately, but only if you know the approved control. Do not blindly toggle a live service. If you do not know the control, contact the owner or ED now.

FIELD JOURNAL

Time / channel / observed behavior / safe identifier

Expected result / actual result / immediate owner

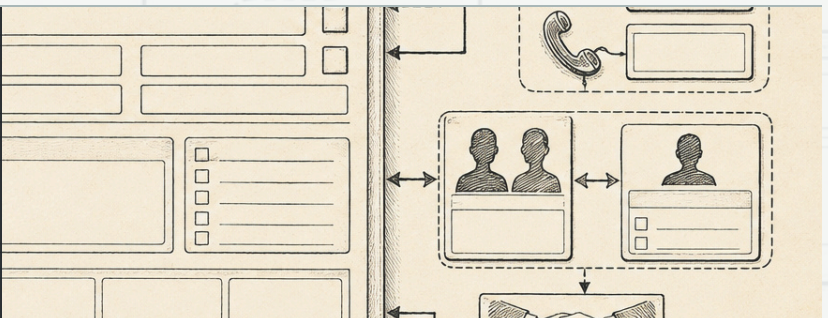
Restricted route used / follow-up requested

Useful report, no private details

"Around 10:20 this morning, a caller asked to change a booking. The existing record did not show that request. I left the record in place and told the handoff owner." Add only the safe record reference through the approved restricted channel.

Keep the original evidence in place

Name the record and time in the approved support route. Do not copy a private conversation into a general chat.



First week becomes ordinary work.

There is no compulsory quota and no need to rerun a launch script. Keep a light rhythm that helps the business make decisions.

KEEP

Read the approved coverage list at shift start. Work one shared incoming list. Name the next action.

CHANGE

Owner records a business decision. ED handles technical implementation and explains the staff impact.

ASK

Use a short safe report when behavior is unusual, unclear, or harmful. Attach nothing raw.



ROUTINE DECISION	OWNER	WHEN TO REVISIT	NOTE
Coverage / holiday hours			
Callback or appointment boundary			
Incoming-list cleanup			

Close the week with one sentence:

What should staff keep doing, what should the owner decide, and what should ED review?

Keep the routine small

Use real work to decide what needs attention. No fake calls, arbitrary quotas or repeat checks of a finished build.