

Weekly CRM review checklist

Najpierw privacy risk. Potem paid audit ready. Na końcu blokery, stale rows i decyzja formatu.

1 Żaden qualified reply nie zostaje bez next action, daty i kolejki.

RUN ORDER

Privacy rows

Usuń raw DM, wyślij privacy guardrail, wyklucz z nurture.

☐ privacy_guardrail_rows cleared

Paid audit ready

Wyślij paid-audit reply albo ustaw call path i next_touch_at.

☐ paid_audit_ready handled

Technical check

Zadaj jedno pytanie o źródła, API albo approval. Bez plików w DM.

☐ technical_check_waiting handled

No next step

Dodaj next_best_action, task_queue i datę.

☐ qualified_no_next_step fixed

Stale / nurture

Jedna czysta próba follow-up albo close. Nurture prosi o jeden proces.

☐ stale and nurture reviewed

Learn

Uzupełnij after-action log i source format board.

☐ weekly learning recorded

END CONDITION

☐ All active rows have next_best_action.

☐ All active rows have next_touch_at.

☐ All active rows have task_queue.

☐ Privacy rows are excluded from nurture.

☐ After-action log has one new row.

☐ Each active format has repeat/fix/stop/convert.

Open first:

crm-review-packet.html
crm-weekly-review.html
crm-operator-card.html

Use sources:

dm-outcome-crm-tracker.csv
crm-review-after-action-log.csv
source-format-learning-board.csv