

Customer Message Handling: The Hidden System Behind Operational Efficiency and Cash Flow: 25 Point Self-Audit

25 point operator self-audit • modonix.com

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How to use: go through each section and check every box that applies. Tally your score at the end. Any unchecked box is a documented operational gap.

Call Handling

- 1 ☐ Do you track how many inbound calls go unanswered each week?
- 2 ☐ Is every missed call logged with caller number and timestamp?
- 3 ☐ Does a missed call trigger an automatic callback within a set window?
- 4 ☐ Have you calculated the revenue value of one average missed call?
- 5 ☐ Is call-handling failure reviewed monthly as a recurring metric?

After-Hours Coverage

- 6 ☐ Can a customer message you outside business hours and get a response?
- 7 ☐ Do you know what time zones your prospects are messaging from?
- 8 ☐ Is there a documented after-hours response protocol in place?
- 9 ☐ Does anyone check after-hours messages before the next business day?
- 10 ☐ Have you lost a deal specifically because of after-hours silence?

Multichannel Response

- 11 ☐ Are all inbound channels, email, chat, social, visible in one queue?
- 12 ☐ Can two team members accidentally work the same customer request?
- 13 ☐ Is there a single system of record for every customer inquiry?
- 14 ☐ Do you know your average first-response time across all channels?
- 15 ☐ Has a customer message ever been lost between tools or inboxes?

Lead Follow-Up

- 16 ☐ Does every inbound lead get flagged if unanswered past a deadline?
- 17 ☐ Have you audited your inbox for leads unanswered over 30 days?
- 18 ☐ Is there an owner assigned to every open lead in your pipeline?
- 19 ☐ Do you discover unanswered leads by accident or by system alert?
- 20 ☐ Is there a recurring check for stalled or forgotten conversations?

Payment Collection

- 21 ☐ Do you know which customers are currently paying late without complaint?
- 22 ☐ Is there a documented process for chasing overdue invoices?
- 23 ☐ Do you pause active work automatically when an invoice goes unpaid?
- 24 ☐ Is invoice priority decided by a rule, or by whoever asks loudest?
- 25 ☐ Have you written off unpaid invoices without a formal collection attempt?

SCORING GUIDE

Score	Level	What it means
0 to 11	CRITICAL	Structural failures are actively destroying margin
12 to 19	MODERATE	Gaps in two or three areas that need immediate attention
20 to 25	STRONG	Systems are solid, focus on optimization

Book a free data audit at modonix.com/service. We identify your top 3 margin leaks in one session. Written by Ahmed Abuswa, Modonix.com