

How your team runs enquiry routing, and changes it

Prepared for Example Co. dealer network · 13 October 2026

OPERATED BY
Head of Sales Operations

READ THIS FIRST IF
You are new to the system

VERSION
v1.0 · 13 Oct 2026

PREPARED BY
The NTWRK delivery team

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01 What you own

■	Decision logic	routing-logic v3.2: nine rules, versioned, in your repository
■	Data record	Enquiry, stock and site-hours tables, with definitions in Appendix A
■	Workflow	Routing into site queues in your CRM, plus a daily list of held enquiries
■	Documentation	This runbook, the rule change guide and training notes for site managers

Everything above is yours: you can open it, change it and appoint someone else to run it.

02 Who runs it

TASK	WHO	WHEN
Review held enquiries	Sales Manager, each site	Daily, 09:00
Approve a rule change	Head of Sales Operations	As needed
Check the stock feed	Operations analyst	On the hourly alert
Quarterly rule review	Head of Sales Operations	Jan, Apr, Jul, Oct

03 The daily routine

WHEN	DO THIS	WHO
09:00	Check the overnight load passed	Operations analyst
09:15	Clear the held list	Sales Manager, each site
17:00	Read the daily summary	Head of Sales Operations

If the load failed, the held list is empty and the queues keep the last good version. Nothing is lost.

04 Change a rule

- 1 Open the rule file in the repository and copy the rule you want to change.
- 2 Edit the copy. Write one line saying why.
- 3 Run the test set. It replays the last eight weeks of enquiries.
- 4 Send the test report to the Head of Sales Operations for approval.
- 5 Publish. The previous version is kept, and a decision record is written.

Reverting takes one step: publish the previous version. The decision record notes who reverted and why.

05 What it still depends on

Your cloud account: running costs continue

A model provider, named in the scope

The stock feed from your dealer system

Your CRM, for the site queues

06 When something looks wrong

WHAT YOU NOTICE	WHAT IT MEANS	WHAT TO DO
The stock feed is more than 30 minutes old	Rule 7 holds new-vehicle enquiries for a person	Operations analyst checks the feed; site managers clear the held list
A new site opens	Enquiries from its postcodes route to the nearest existing site	Add the site and its hours to the site table; run the test set
A rule routes enquiries to the wrong team	The daily held list shows a cluster from one rule	The Head of Sales Operations reverts to the previous version, then changes the rule

Each fix above is written as a decision record, so the next person can trace it.

A **Appendix A: definitions**

TERM	DEFINITION
enquiry	A website form, call-back request or email lead with a contact detail
first reply	The first message or call from a person at a site, logged in the CRM
held	An enquiry the logic will not route without a person
site	A dealership location with its own sales and service desks

B **Version history**

VERSION	DATE	CHANGE	APPROVED BY
v1.0	13 Oct 2026	Handover version	Head of Sales Operations