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COMPLETE FREE ADMINISTRATIVE WORKBOOK

Follow up well. No pressure.

Permission. Delivery. Replies.
Keep the evidence separate.

Helpful, not pushy.

Full messages / Permission ledger / Ten answers

EDITION 2.0 / SEPTEMBER 2026

A practical workbook, not a promise of results.

Inside the workbook

Decide who qualifies, reconcile what happened and report only outcomes the records support.

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How to use this workbook

Edition 2.0 - reviewed September 18, 2026

A good follow-up lets a customer ask a question without being pressed to endorse the business or buy another service. This complete free workbook gives you a permission ledger, two-message dispatch rehearsal, uncertain-delivery recovery and a separate repeat-visit calculation. You can finish every exercise without buying a member guide or connecting an account.

Willow Plumbing Office and all records are fictional. The purpose is administrative communication, not diagnosis, repair advice, safety clearance or a universal maintenance schedule. A completed job does not establish that every system is working correctly. Customer concerns go to the responsible human process; no warranty outcome, refund or free return visit is promised here.

For a service coordinator with basic record-reading skills, allow an estimated 35-50 minutes. Use a pen, calculator and the tables below, or a spreadsheet. Optional Kimi sees synthetic IDs only. No software purchase is required; optional plans may cost money. Before using the method with real people, a human owner must supply approved contact routes, message permissions and escalation procedures. This exercise sends nothing.

1. Decide who should receive which message

The review time is October 7, 2026 at 09:00 UTC. All timestamps below use UTC. Each permission record refers specifically to a single administrative post-visit check-in, not newsletters, promotional offers or unlimited future contact. Actual addresses, phone numbers, property details and access notes are intentionally absent.

Contact ID	Job state	Check-in permission	Other current fact
P01	Closed October 6	Yes, A01	No earlier check-in
P02	Closed October 6	Yes, A02	No earlier check-in
P03	Closed October 6	Withdrawn, W03	No earlier check-in
P04	Closed October 6	Invoice route only	No earlier check-in
P05	Closed October 6	Yes, A05	Concern H05 needs owner
P06	Closed October 6	Yes, A06	M06 already delivered
P07	In progress	Yes, A07	No closure record
P08	Closed October 6	Yes, A08	No earlier check-in

The export contains the eight rows above plus one exact duplicate of P02, making nine rows. Contact ID is the exercise's identity key; the duplicate has identical payload and does not represent another person or permission. If the duplicate instead had a different withdrawal state, stop that contact for reconciliation rather than picking the more convenient row.

The routine rule is explicit: closed job, permission for this check-in, no current concern needing human handling and no earlier delivered check-in. P01, P02 and P08 qualify initially. P03 is suppressed; P04 has no permission for this purpose; P05 needs the human concern process; P06 already received the message; P07 is not closed. A bill-delivery route is not permission to add a promotional paragraph or referral request.

Morgan owns the queue and Avery owns concern H05. Do not ask AI to infer the seriousness of H05 from a fragment of customer text. This packet does not disclose that text. In a real urgent situation, follow the business's established human escalation process and appropriate local emergency route rather than waiting for a scheduled marketing reply.

2. Write helpful messages with clear boundaries

The routine draft deliberately avoids "everything is working great" because the packet supplies no such observation. It also avoids a request for a positive review, a recommendation of annual work or a promise that a reply will be handled free of charge. A concise question is useful enough without a sales pitch.

Routine message: "Hello from Willow Plumbing Office. This is the one-time administrative check-in you agreed to after your recent visit. Do you need a copy of your paperwork or help reaching the office about a question? Please reply through this private thread without posting property or account details publicly. This message does not assess the condition of your plumbing or schedule more work. If you no longer want this check-in route used, tell us and we will update our records."

Concern acknowledgment for P05, through the established authorized concern channel: "Thank you for raising your concern. Avery is the named person reviewing H05; we have not reached a technical finding or a decision about charges, refunds or coverage. Your concern is separate from the routine check-in list. We will use the existing private contact route for the next update. Please do not treat this acknowledgment as a safety clearance or confirmation that another visit has been booked."

For this fictional acknowledgment, Morgan has verified Avery accepted ownership at 09:02 and authorized an administrative update by 12:00 UTC. Add this specific sentence only after those records exist: "Avery has accepted the handoff and authorized an update by 12:00 UTC today, October 7." It promises an update, not resolution by noon. Without that record, keep the timing unresolved and escalate through the approved process.

Permission correction draft: "We have updated P03's record to stop the check-in messages covered by your withdrawal. That change does not mean we have deleted every transaction record, cancelled an appointment or resolved an open question. If you need help with existing paperwork, use the office's normal private contact route."

Do not automatically send a new confirmation merely because an opt-out was received. The draft is for an owner to use when an appropriate permitted reply is needed. Record the suppression first; permission changes must not depend on whether a confirmation email succeeds.

3. Recheck immediately before dispatch

At 09:04, P02 withdraws the check-in permission under W02. Morgan reviews the current queue at 09:05. The final routine candidates are P01 and P08, not the earlier three. Preserve both the earlier decision and the new reason for exclusion; a cached list cannot outrank a later withdrawal.

The following is a synthetic delivery record, not a tool run. The provider's word "accepted" means only that it accepted the request in this packet, not that the customer received or read anything.

Event ID	Message/contact	Reported state	Time
D01	M01 / P01	Delivered	09:06
D08	M08 / P08	Accepted; delivery unknown	09:06
D01	M01 / P01	Exact duplicate of D01	09:06

Three exported event rows become two unique event IDs. There are two distinct message attempts and one verified delivery. The delivered share of attempted messages is $1/2 = 50\%$, but the other message is unknown, not proven failed. No read receipt or open is supplied. Do not report a fifty-percent failure rate from this table.

M08's unknown status triggers reconciliation, not a fresh message ID and a second attempt. Morgan checks the original message reference through the approved channel and keeps further attempts held until the result or an owner-approved recovery decision exists. This procedure does not claim every platform supports an idempotency feature or automatic lookup; it is a required operational question before adopting a tool.

At 09:12, P01 replies, "Please send another copy of the paperwork." That is one administrative response, not a new job, referral, positive testimonial or repeat booking. Filled reply: "We have received your request for a copy of the paperwork. Morgan will verify the recipient and document version using the existing private record before releasing it. Please do not send payment details or access codes in this reply. No additional visit has been booked."

If the same reply appears in two inbox exports with the same source message ID, count one response. If IDs are absent, label deduplication unresolved rather than inventing a confident response rate. Provider delivery, human response and business outcome answer different questions.

4. Measure return visits without claiming causation

Use a separate historical teaching cohort, not P01-P08. All six Q contacts completed an initial visit during September 1-7, 2026. The observation cutoff is September 30 at 23:59 UTC. Each Q ID is one customer in this exercise; all visits listed are within that period. Follow-up exposure and a comparison group are not supplied.

Customer	Later records by cutoff	Completed repeat visits	Counts as returning?
Q01	Two additional completed visits	2	Yes
Q02	No later visit	0	No
Q03	Proposed repeat cancelled	0	No
Q04	One additional completed visit	1	Yes
Q05	Enquiry; no confirmed visit	0	No
Q06	Booking for October 2	0	No by cutoff

Two of six customers returned with a completed repeat visit: $2/6 = 33.3\%$ rounded to one decimal place. There were three completed repeat visits because Q01 returned twice. Three divided by six is a visit-to-customer ratio of 0.5, not a fifty-percent customer repeat rate. Q06's later booking does not enter September's completed-return numerator.

Report draft: "In the supplied six-customer September cohort, two customers had completed repeat visits by September 30, giving a 33.3% observed customer repeat rate. Those customers account for three repeat visits. The packet does not establish whether follow-up caused any return, whether repeat work was desirable, or what revenue or profit resulted."

A return can concern unresolved work rather than successful retention. Do not celebrate every repeated visit as a commercial win without classifying why it happened. The worksheet deliberately avoids service-outcome claims because no technical evidence is supplied. Keep administrative counts separate from quality review and financial reporting.

5. Run an independent change drill and keep a handoff

Restart at the original 09:00 P ledger, before W02. In this independent branch, P04 now has explicit permission A04 for the check-in, and P08 develops a concern needing Avery's review. Every other original fact stays unchanged. The correct routine set is P01, P02 and P04. P08 moves to the human queue; it does not get a softer promotional version of the same message.

This drill tests whether the decision follows current evidence rather than a memorized answer. The count happens to remain three, but the membership of the set changes. A test that checks only the count would miss contacting the wrong person. Record IDs and reasons, not just a green total.

Reusable field	Your entry	Review question
Contact and source event ID	_____	Exact duplicate or conflict?
Closed-job evidence	_____	Actual closure or assumption?
Permission purpose/reference	_____	Covers this message now?
Withdrawal/concern/prior send	_____	Any exclusion applies?
Draft version and reviewer	_____	Scope and wording checked?
Attempt and delivery reference	_____	Unknown or confirmed?
Next owner and follow-up action	_____	Human accepted handoff?

Filled handoff at 09:15: "Original export: nine rows, eight contacts. Three routine candidates at 09:00; two after W02. M01 delivered; M08 delivery unknown, reconciliation owned by Morgan. P01 requested paperwork, not a new job. H05 belongs to Avery with a separately authorized noon update. No extra service, review request or safety assessment has been generated."

Optional Kimi prompt: "Use synthetic P01-P08 only. Closed jobs except P07; check-in permission except withdrawn P03 and invoice-only P04; P05 has a concern, P06 a prior delivered message. Duplicate P02 is identical. Identify the initial set. Then withdraw P02 before dispatch; classify M01 delivered and M08 accepted/unknown with duplicate D01. Separately restart the original ledger with P04 permission and P08 concern. Return exact IDs, reasons and unknowns. Never send, diagnose, recommend maintenance or infer a warranty. Compare Q01's two completed returns and Q04's one against six original customers; all other Q rows have none by cutoff."

Before using a live system, choose one owner for suppression records, another reviewer if available for message wording, and a documented reconciliation route for uncertain sends. This is a process design, not proof that any named platform implements these controls. Keep originals in the approved business system and do not paste real customer conversations into the practice prompt.

6. Check the ten reference answers

1. **How many unique P contacts are present?** Eight. The ninth export row is an exact duplicate of P02, not another eligible person.
2. **Who initially qualifies?** P01, P02 and P08. Closure alone is insufficient; permission, concerns and prior delivery also matter.
3. **Why is P04 excluded initially?** Its contact permission covers invoices only, not this check-in. A familiar address is not a wider permission record.
4. **Who remains after W02?** P01 and P08. Recheck current suppression at dispatch, not just when preparing the list.
5. **What does the event ledger prove?** Two distinct attempts, two unique event IDs and one verified delivery. Three raw rows are not three messages.
6. **What is the delivery percentage?** One of two attempts is verified delivered: 50%. The remaining 50% is unknown, not established failure.
7. **Should M08 automatically be resent?** No. Reconcile its original reference first; uncertain delivery can conceal an already delivered message.
8. **What is the independent branch's eligible set?** P01, P02 and P04. P08 now belongs to human concern handling.
9. **What is the cohort repeat rate?** Two returning customers out of six, or 33.3%; they generated three completed repeat visits. October's booking is outside the cutoff.
10. **What commercial outcome does P01's reply establish?** A request for paperwork only. It proves no booking, review, referral, revenue or technical satisfaction.

Sources and limits

- [Mailchimp: importance of permission](#) supports checking permission rather than assuming it from a customer relationship. This is not a universal legal classification of service messages.
- [FTC: protecting personal information](#) informs limited-data handling.
- [Kimi official site](#) identifies the optional assistant; no live message or account operation was tested.

Sources checked September 18, 2026. Editorial reviewer role: CreatorHQ customer-communication and evidence editor. Edition 2.0 replaces repeat-business guarantees, positive-review filtering and universal maintenance suggestions with a complete free permission-and-reconciliation exercise. Real technical concerns and communication requirements need the business's responsible human review.