

Sample System Map

Routing, ownership, SLAs, and failure handling

Example artifact, not client specific

What this map does

Visibility: Track every lead from entry to outcome.

Accountability: Owners plus SLAs prevent stalling.

Escalation: Alerts fire when SLAs breach or rules fail.

No dead ends: Every input ends in a logged next step.

 If it cannot survive a Tuesday, it is not a system.

Scope

Tools

- CRM
- Forms
- Phone
- Email/SMS
- Calendar
- Automation layer

Objects

- Lead
- Contact
- Opportunity
- Appointment
- Task

Inputs and triggers

Web form submission

Lead data captured directly from website forms, validated for completeness before routing.

Inbound call

Answered, missed, or voicemail — every call generates a logged event and triggers appropriate follow-up.

Manual lead entry

Sales team creates leads directly in CRM with required fields enforced at entry.

Referral or import

Partner referrals or batch imports processed through validation and duplicate checking before assignment.

Re-engagement reply

Dormant leads responding to nurture campaigns re-enter active routing with updated context.

 Every input becomes an event, every event gets logged.

Lifecycle stages



Outcome = booked, disqualified, or nurture

Handoff = delivery ownership with SLA

Routing logic (high level)

- Route by source, geo, service, capacity, priority.
 - Assign with guardrails (round robin plus fallback owner).
 - Dedupe by phone/email, merge, keep latest activity.
 - Edge cases go to Manual Review, never guess.
- ❏ No decision rule, no automation.

Ownership and SLAs

Step	Owner	SLA	Escalation
Capture input	System	Instant	Alert on failure
Validate data	System + Ops	2 min	Flag missing fields
Assign owner	System	1 min	Fallback owner
First response	Owner	5 min	Escalate at 10 min
Follow-up	System + Owner	7 days	Escalate on no activity
Booked handoff	Owner + Delivery	24 hrs	Escalate to lead

Failure handling and reporting

Failure handling

- Missing info → Manual Review + task
- Duplicate → merge + notify owner
- Tool outage → queue + retry + ops alert
- Owner at capacity → fallback + escalate

Reporting hooks

- Stage timestamps
- Assignment history
- First response time + SLA breaches
- Outcomes (booked, no show, disqualified)
- Failures, retries, queue volume

📄 If it is not logged, it cannot be improved.

Governance model

Executive owner

CEO/Owner sets priorities, approves rules, and holds the line on standards and system integrity.

Systems owner

Ops lead (or Sales/Rev Ops lead) owns the process, defines SLAs, and manages day-to-day system health.

Technical owner

NXTCatalyst designs and implements the system, sets test cases, and monitors reliability and performance.

Day-to-day users

The team follows the workflow, provides feedback, and flags issues for continuous improvement.

 Owned by leadership, run by ops, implemented and monitored by NXTCatalyst.

Want this built for your team

Start with the AI Ops Readiness Scorecard

Get a structured assessment of your current systems, gaps, and readiness for automation.

Get a clear next step in one pass

Walk away with prioritized recommendations and a roadmap tailored to your operations.

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NXTCatalyst, Sample artifact, not client specific