

A JAYSON FORDE EXECUTIVE STRATEGIC PLAYBOOK

Customer Communication & Support Automation

Heard
Seen
Engaged
COMMS INFRA

Closing Communication Gaps & Delays So No Client Goes
Unheard, Unnoticed, or Unengaged

Continuous Communication · Proactive Infrastructure · Gap & Delay Resolution · Client Engagement

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CONFIDENTIAL

— BEFORE YOU BEGIN

Purpose & Impact

◆ THE PURPOSE

This system exists to close the single most damaging failure in customer operations: **the communication gap**. When clients go unheard, when accounts slip out of view, and when days pass without clear communication, trust erodes and renewals are lost, not because the product failed, but because the client felt forgotten. This is my operator system for keeping every client heard, seen, and continuously engaged across the entire process.

THE GOVERNING PRINCIPLE

No client goes unheard. No client goes unnoticed. No client goes long stretches without clear communication. No client unheard, unnoticed, or unengaged.

◆ WHAT IT SOLVES

- ◆ Communication gaps and delays, the core problem, where clients wait in silence and disengage.
- ◆ Clients slipping out of view with no owner, no follow-up, and no acknowledgement.
- ◆ Onboarding and requests that stall because no one is actively driving the conversation.
- ◆ Leadership having no view of where communication is breaking down.

◆ WHAT IT ENHANCES

- ◆ Continuous engagement, the client is kept informed and involved through every stage.
- ◆ Responsiveness, every client is acknowledged immediately and never left waiting.
- ◆ Visibility, the operator and leadership always see the state of every client conversation.
- ◆ Trust, consistent, proactive communication that makes clients feel prioritized.

◆ THE RESULTS IT DELIVERS

- ◆ Every client heard and acknowledged, automatically, with no request left silent.
- ◆ Every account continuously visible, nothing slips through unnoticed.
- ◆ Proactive, ongoing communication that keeps clients engaged start to finish.
- ◆ Faster resolution and stronger retention, driven by closed communication gaps.

BUILT BEFORE THE ISSUE, OR INSERTED INTO A BROKEN ONE

This automation works two ways. **Built ahead of time, it is proactive operational infrastructure**, communication gaps never get a chance to form. **Inserted into a broken operation** already suffering drops, delays, and silence, it brings immediate structure and resolution, restoring communication where it had failed. Either way, the outcome is the same: no client left unheard or unengaged.

EXECUTIVE OVERVIEW

Closing the Communication Gap, Automatically

This playbook is my operator system for closing the communication gap in customer operations. Onboarding, queues, tickets, and responses are automated not merely to move faster, but to **keep every client heard, visible, and continuously engaged**, so no client waits in silence and no account slips out of view. It can be built as infrastructure before problems begin, or inserted into a broken operation to restore communication where it has failed.



WHERE SUPPORT AUTOMATION SITS IN THE CUSTOMER LIFECYCLE

EVIDENCE BOUNDARY

This playbook is a formalized reconstruction of the repeatable automation methods I use. Tool configurations and demonstration data are **illustrative and sanitized**; no confidential customer records are represented. The methods are anchored to real operating experience building and scaling customer-success and support operations.

Every Automation Is a Communication Touchpoint

- ◆ **Onboarding**, the client hears from us immediately and is guided, never left wondering what happens next.
- ◆ **Queue management**, every request is acknowledged and owned, so no client waits unheard.
- ◆ **Tickets and responses**, automated acknowledgements mean a client is never met with silence.
- ◆ **Proactive updates and reporting**, communication is continuous, keeping the client engaged and leadership informed.

— THE OPERATOR STACK

The Tools I Automate With

Asana

WORK & QUEUE

Asana holds the work: onboarding projects, ticket queues, task ownership, status, and SLA due dates, the single place support work lives and is tracked.

Zapier

CROSS-APP AUTOMATION

Zapier connects the tools: when a client is won or a request comes in, it triggers the right actions across systems, creating projects, routing tickets, and notifying owners automatically.

NotebookLM

KNOWLEDGE & REPORTING

NotebookLM holds customer knowledge and SOPs and turns support activity into digestible reporting, so the queue and resolution picture is always visible.

Microsoft Power Automate

MS ECOSYSTEM ONLY

Power Automate runs the equivalent flows and reporting inside a Microsoft environment (Teams, Outlook, SharePoint, Excel). **Applies only when the client operates on the Microsoft ecosystem.**

ONE STACK, ANY ENVIRONMENT

Asana, Zapier, and NotebookLM are the core stack. **Power Automate is used only for Microsoft-ecosystem clients**, the automation logic is the same; only the engine changes to fit the client environment.

— CONTENTS

The Support Automation System

- 01 New-Client Onboarding Automation**
From client won to fully set up, triggered and tracked automatically.
- 02 Customer Queue Management**
Auto-triage, assignment, SLA timing, and resolution.
- 03 Ticket & Response Automation**
Routing by type and priority, with automated responses.
- 04 The Automation Build Path & Governance**
How I design, gate, and monitor each automation.

SECTION 01

New-Client Onboarding & First Contact

The moment a client is won, the conversation begins, immediate contact, clear next steps, and a client who feels seen from minute one.

A closed deal or a submitted intake form triggers the automation: Zapier creates the onboarding project in Asana with the right tasks and owners, and NotebookLM captures the client context and produces the status digest. The operator oversees; the setup runs itself.



NEW-CLIENT ONBOARDING AUTOMATION · TRIGGER TO TRACKED SETUP

ACCOUNTABILITY

- ♦ A named owner is assigned automatically to every onboarding project.
- ♦ The operator reviews the auto-created plan before client-facing steps go out.
- ♦ Nothing client-facing sends without the human-review gate.

MEASUREMENT

- ♦ Time from client-won to onboarding-started (target: minutes, not days).
- ♦ Onboarding completion rate and time-to-first-value.
- ♦ Percentage of onboardings triggered automatically vs. manually.

SECTION 02

Queue Management & Acknowledgement

Every request is heard and acknowledged the moment it arrives, entered into one governed queue, owned, and timed, so no client waits in silence.



CUSTOMER QUEUE LOOP · REQUEST IN TO LOGGED & REPORTED

Requests are captured, auto-triaged by type and priority, assigned to an owner, and put on an SLA timer. Resolution is logged, and the queue health rolls up into automated reporting, so the operator sees pressure building before it becomes a backlog.

ACCOUNTABILITY

- ◆ Every request has an owner and an SLA the moment it enters the queue.
- ◆ Aging or breached items are auto-flagged to the operator and lead.
- ◆ Resolved requests are logged to the customer record automatically.

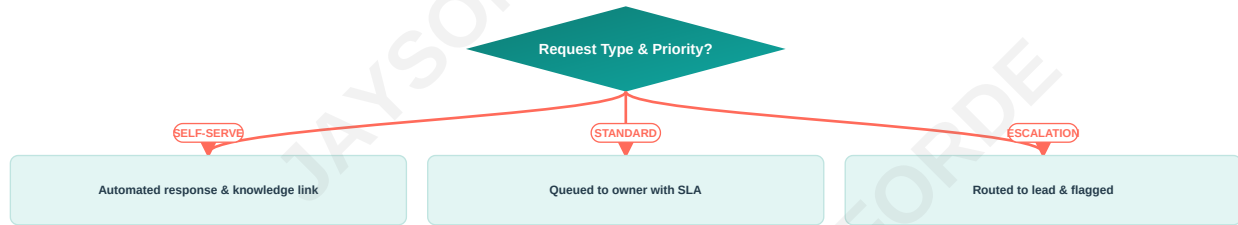
MEASUREMENT

- ◆ First-response and resolution time against SLA.
- ◆ Queue volume, aging, and breach rate.
- ◆ Backlog trend and reopen rate.

SECTION 03

Response & Continuous Communication

Every client gets an immediate, accurate response and stays informed through resolution, routed by type and urgency, so the conversation never goes quiet.



REQUEST ROUTING · SEVERITY-BASED DECISION PATH

Self-serve requests get an automated response and a knowledge link from NotebookLM; standard requests are queued to an owner with an SLA; escalations are routed to a lead and flagged. Every customer gets an immediate, accurate acknowledgement, automatically.

ACCOUNTABILITY

- ◆ Escalations always reach a named lead, never a dead queue.
- ◆ Automated responses are reviewed and approved templates, not unchecked AI.
- ◆ The operator owns the routing rules and reviews edge cases.

MEASUREMENT

- ◆ Auto-response rate and deflection to self-serve.
- ◆ Escalation rate and time-to-lead.
- ◆ Customer acknowledgement time (near-instant).

SECTION 04

The Automation Build Path & Governance

I do not bolt automation on. Each workflow is mapped, designed, gated with human review, then automated and monitored.



AUTOMATION BUILD PATH · MAP TO MONITOR

HUMAN-IN-THE-LOOP

Automation handles the routing, timing, tracking, and reporting; **people keep judgment on anything customer-facing or high-stakes**. Speed on the mechanics, human governance on the message.

Inspectable Artifacts

Onboarding Automation Map

Trigger, steps, owners, and systems for the onboarding flow.

Demo: *sanitized flow*

Queue & SLA Matrix

Request types mapped to owners, SLAs, and escalation paths.

Demo: *illustrative*

Response Template Library

Approved automated responses by request type.

Demo: *sample set*

Support Reporting Digest

Auto-generated queue-health and resolution report.

Demo: *sanitized digest*

THE PLAYBOOK IN ONE LINE

I build the communication infrastructure that keeps **every client heard, seen, and engaged**, closing the gaps and delays that lose clients, whether built before the issue or inserted to fix a broken one.