CLIENT INTAKE · ONE WORKFLOW · TWELVE FAILURE TESTS

The Client Intake Failure-Test Kit

Check whether every valid inquiry reaches a named owner before buying more traffic.

For boutique consultancies, professional-service firms and Denver service-business owners.

USE THIS AFTER THE WORKFLOW WORKSHEET

1. Choose one intake path, such as website inquiry → intake queue → owner inbox or CRM.
2. In a sandbox, use **Casey Test · casey@example.com · "Synthetic service inquiry KIT-001"**. Use a controlled test mailbox or email sink, not a real prospect.
3. Run each case. Mark **Pass** only with evidence of every expected result; mark **Fail** for a mismatch or **Not tested** if you cannot verify it.

SAFE TEST BOUNDARY

Get authorization, isolate test records and prevent live customer messages. Simulate outages; do not break production. This file is a manual checklist, not a test runner.

Use synthetic data only. Checklist entries are not automatically transmitted or saved in browser storage. Changes live in this tab until reset or reload.

01	02	03	04
Attempt	**Server-accepted**	**Delivered**	**Qualified**
A click or request was made. Not proof the server received it.	Validation passed and a durable record with an ID was committed. A 200 response alone is not enough.	The intended inbox or CRM contains the inquiry with a named owner. Provider acceptance alone is not delivery.	An owner applied written fit criteria. Receipt, delivery and opt-in are not qualification.

Capture the inquiry 01

First prove that a valid request becomes one durable record, even when the browser misbehaves.

01 Valid inquiry, durable receipt

ATTEMPT → SERVER-ACCEPTED

SETUP Submit KIT-001 with all required fields and a controlled test address. Close the tab after the receipt; inspect the sandbox record independently.

EXPECTED Show success only after a durable record is committed. Return a stable receipt ID. The record survives tab closure and can be found by ID; do not call it delivered or qualified.

KEEP AS EVIDENCE Receipt ID + persisted record; no reliance on a success animation.

Result

○ Pass ○ Fail ◉ Not tested

Evidence / next action: _____

02 Missing or malformed fields

ATTEMPT ≠ SERVER-ACCEPTED

SETUP Omit the contact field, then send a malformed test address. Repeat directly against the authorized test endpoint to bypass browser validation.

EXPECTED Server validation rejects invalid inputs with actionable errors. Preserve safe entered values. Create no accepted inquiry, delivery or conversion. Then correct the data and verify one acceptance.

KEEP AS EVIDENCE Validation response + zero accepted records before correction.

Result

○ Pass ○ Fail ◉ Not tested

Evidence / next action: _____

03 Duplicate retry, one inquiry

MANY ATTEMPTS → ONE ACCEPTED ID

SETUP Double-click a valid synthetic inquiry and replay the identical request with the same idempotency key. Also try changing the payload under that key.

EXPECTED Identical retries return the original accepted ID, with one record and one downstream handoff. A changed payload under the same key is rejected, not silently overwritten. A genuinely new inquiry uses a new key.

KEEP AS EVIDENCE Request keys + one durable record + one routed item.

Result

○ Pass ○ Fail ◉ Not tested

Evidence / next action: _____

04 Network loss, honest status

UNKNOWN OUTCOME ≠ SUCCESS OR FAILURE

SETUP In a test proxy, drop a request before it reaches the server; then drop a response after the server commits. Retry each using its original key.

EXPECTED No false success for a request that never arrived. A lost response shows pending/unknown until safe retry or lookup resolves it. The committed case returns its original receipt without creating a duplicate.

KEEP AS EVIDENCE Both failure points + final unique IDs and accurate UI state.

Result

○ Pass ○ Fail ◉ Not tested

Evidence / next action: _____

Route it. Recover it.

02

A durable record needs a destination, an accountable person and a way back when a dependency fails.

Before these tests, name a primary owner, a backup and an alert recipient. Agree a delivery deadline and a recovery deadline for this workflow. Record them in the handoff brief. Do not invent a universal response-time target.

05 Provider outage after acceptance

ACCEPTED → PENDING DELIVERY

SETUP Make the sandbox inbox or CRM adapter return timeout, 429 and 5xx responses after KIT-005 is committed. Restore the adapter after the agreed retry window.

EXPECTED Keep the inquiry durably queued. Retry safely with backoff and rate-limit handling; stop bounded retries into a visible exception queue. No lost record or false delivered status. Recovery creates one destination record.

KEEP AS EVIDENCE Accepted ID + retry history + exception entry + destination ID.

Result

○ Pass ○ Fail ◉ Not tested

Evidence / next action: _____

06 Right destination, named owner

DELIVERED ≠ QUALIFIED

SETUP Send synthetic inquiries for two service categories. Inspect both the intended inbox or CRM and assigned owner. Repeat with the primary owner unavailable.

EXPECTED Map the right fields to the right destination and one named person. A shared inbox alone is not ownership. Verify a backup takes responsibility when needed. Do not mark qualified until written fit criteria are applied.

KEEP AS EVIDENCE Destination record + category rule + primary/backup assignment.

Result

○ Pass ○ Fail ◉ Not tested

Evidence / next action: _____

07 Alert, recover, close the loop

EXCEPTION → VERIFIED DELIVERY

SETUP Leave KIT-007 undelivered beyond the agreed alert deadline. Have the named recovery owner inspect the alert, repair the test mapping and replay the original record.

EXPECTED Alert an accountable person with a minimal ID and protected recovery link, not inquiry contents. Track acknowledgment and escalation to backup. Manual replay uses the same ID, avoids duplicates and closes only after verified delivery.

KEEP AS EVIDENCE Alert/acknowledgment times + recovery log + delivery proof.

Result

○ Pass ○ Fail ◉ Not tested

Evidence / next action: _____

08 Permission boundary holds

AUTHORIZED ACCESS ONLY

SETUP With an anonymous session and a low-privilege test account, try reading, changing, exporting or replaying another synthetic inquiry by guessing or altering its ID.

EXPECTED The server denies each unauthorized action, even if UI controls are hidden. No inquiry data, secrets or enumerable receipts leak. Only authorized roles can route or recover; record denials without logging full payloads.

KEEP AS EVIDENCE Role/action matrix + denial responses + restricted audit entry.

Result

○ Pass ○ Fail ◉ Not tested

Evidence / next action: _____

Do not clear the exception because an email API returned "OK." Close it only after destination evidence shows the right record and named owner, or after an authorized person completes and records the manual handoff.

Keep the original accepted ID through retries and recovery. Preserve the failure, recovery action and final outcome so the next owner can follow the trail.

Measure without overcollecting

03

Keep operational handoff, qualification and marketing consent separate. Reconcile counts before interpreting them.

Inspect sandbox records, event payloads and restricted logs. Checklist entries are not sent as analytics events. A passing checklist is not a legal-compliance finding, a validated risk score or proof that every future inquiry will succeed.

09 Source survives the handoff

SOURCE ATTACHED TO ACCEPTED ID

SETUP Create tagged campaign, referral and untagged synthetic inquiries. Retry one. Include an unexpected source value and a URL query containing a synthetic email.

EXPECTED Allowed source/campaign fields follow the accepted ID into the destination without retry overwrites. Missing source is unknown/direct, not invented. Treat source as untrusted; strip personal/query data and never use it as permission.

KEEP AS EVIDENCE Accepted-to-destination source mapping + sanitized values.

Result

◯ Pass ◯ Fail ◉ Not tested

Evidence / next action: _____

10 Inquiry is not marketing consent

SERVICE REQUEST ≠ SUBSCRIPTION

SETUP Send one service inquiry with marketing opt-in unchecked and one explicitly checked. In the sandbox, test a later preference withdrawal. Inspect the preference record and marketing destination.

EXPECTED Both inquiries reach service owners. Unchecked means no marketing enrollment. Any opt-in is separate, optional and initially unchecked, with the displayed wording/version and time recorded. Withdrawal updates the marketing path without deleting the service request.

KEEP AS EVIDENCE Separate service/consent fields + no-enrollment case + withdrawal.

Result

◯ Pass ◯ Fail ◉ Not tested

Evidence / next action: _____

11 One conversion, no personal data

UNIQUE SERVER-ACCEPTED CONVERSION

SETUP Inspect sandbox conversion payloads after one rejected attempt, one acceptance, a retry and two receipt-page reloads. Also inspect URLs and automatic page metadata.

EXPECTED Count one accepted-inquiry conversion only at durable acceptance, deduped by an opaque event key. Rejects and reloads add none. Allowlist event/stage/source fields; exclude names, emails, phone numbers, message text, raw URLs and linkable customer IDs. Keep delivery and qualification as separate stages.

KEEP AS EVIDENCE Event count + dedupe key + payload/metadata field audit.

Result

◯ Pass ◯ Fail ◉ Not tested

Evidence / next action: _____

12 Reconcile and clean up

ATTEMPT / ACCEPTED / DELIVERED / QUALIFIED

SETUP In one time window, use 5 attempts: one invalid, a valid inquiry plus its retry, and two new valid inquiries. Hold one of the 3 accepted records pending; qualify one of the 2 delivered records. Apply the agreed test-data retention rule.

EXPECTED Reconcile 5 attempts, 3 unique accepted, 2 delivered, 1 qualified and 1 pending by ID and timestamp. Surface the pending exception. Limit evidence access and retained fields; remove synthetic payloads from queue, destination and logs according to the documented retention/backup policy.

KEEP AS EVIDENCE Stage ledger + unresolved ID + retention/cleanup check.

Result

◯ Pass ◯ Fail ◉ Not tested

Evidence / next action: _____

Four counters, four meanings. Report attempts, unique server-accepted inquiries, delivered inquiries and qualified inquiries separately. Show the time window and test-data exclusions.

A repeat attempt must not inflate accepted conversions. A delivery delay must not erase the accepted inquiry. A failed permission check must never expose another inquiry.

TURN EVIDENCE INTO ONE BOUNDED NEXT STEP

Your checklist, not a score

0 / 12	0	0	12
TESTS COVERED	PASSES	FAILURES	NOT TESTED

Coverage = Pass + Fail. These are checklist counts only, not weights, a grade or a prediction. Investigate failures and untested cases before treating intake as dependable.

FICTIONAL WORKED EXAMPLE · NOT A RODGERS INTELLIGENCE CLIENT

Juniper Desk, an invented Denver consultancy

Setup: One synthetic inquiry for a process review. Two browser attempts use the same request key. One accepted record, KIT-104, is committed. A simulated CRM outage blocks delivery; an alert goes to fictional owner Morgan.

Recovery: Morgan replays KIT-104 once after the CRM returns. One owned CRM record is verified. Result: **2 attempts → 1 accepted → 1 delivered → 0 qualified**. Qualification awaits a fit review; marketing opt-in remains false.

Illustrative checklist: Tests 01, 03, 05, 06 and 07 pass; test 09 fails because source was dropped; six tests remain not tested. Coverage 6/12, passes 5, failures 1. Fix the source mapping, retest 09, then run the remaining cases. These fictional results are not loaded into your checklist.

Copyable one-workflow handoff

One workflow and finish line

_____

Connected systems (up to 3 for review)

_____

Primary / backup / alert recipient

_____

Delivery / alert / recovery deadlines

_____

Next fix, owner and retest date

_____

Client Intake Failure-Test Kit: ONE-WORKFLOW HANDOFF
Workflow / finish line: [to define]
Systems: [to define]
Primary / backup / alert recipient: [to define]
Delivery / alert / recovery deadlines: [to define]
Checklist: 0/12 covered; 0 pass; 0 fail; 12 not tested. Counts only, not a risk score.
Failed tests: None marked. Untested is not a pass.
Not tested: 01, 02, 03, 04, 05, 06, 07, 08, 09, 10, 11, 12
Evidence / actions: [add synthetic IDs and observations in the checklist]
Next fix / owner / retest: [to define]
Acceptance: valid inquiry durably accepted once; delivered to named owner or visible exception; stage counts reconciled. Qualification and marketing opt-in remain separate.
Boundary: synthetic data, authorized environment, no new traffic or marketing automation in scope. No personal data in conversion payloads.
Sharing: nothing is automatically sent, subscribed or purchased.

OPTIONAL NEXT STEP

One Workflow Review

Priced after a short conversation

- One workflow, up to three connected systems.
- An independently usable plan.
- Direct fixed-scope implementation is also possible.

This kit stands on its own. You do not need to buy a review to use it.

Discuss one workflow:
rodgersintelligence.com/contact

Opening the contact page does not send this checklist, subscribe you or start a purchase. Implementation is scoped separately.

This is a practical failure-test checklist, not legal advice or a certification. Keep detailed evidence in your authorized test environment. Record only synthetic IDs and minimal observations here. Reset clears this tab; downloaded files remain on your device.