

CLOSED-LOOP CHECKLIST (7-DAY EXPERIMENT)

Reduce escalations by designing around silence – no tools required

Key idea: Escalations are what silence turns into when the client is forced to ask. Prevent silence by making ownership, next steps, and update expectations explicit. Start with one workflow and run it for 7 days.

Three Steps

- Step 1 - Find where the loop breaks.** Where do requests enter before they become tracked work (email, chat, meetings, vendor threads)?
- Step 2 - Close the loop.** Every request gets: Owner of Record, Next Action, Next Update Due (client-visible).
- Step 3 - Guard the loop.** Use two guardrails + two simple metrics so loops stay closed under pressure.

Closed-loop fields

- Owner of Record** One accountable owner (not 'the team').
- Next Action** The next concrete move (not 'waiting').
- Next Update Due** When the client hears from you next – even if blocked.



Guardrails



- If Next Update Due passes with no client-visible update, nudge/escalate.
- If work is logged or marked done without a client-visible update, prompt a one-liner closure note.



Metrics



- Update Lag** How often updates miss the promised update time (trend weekly).
- Stale Ticket Rate** How many items are past Next Update Due (trend weekly).

Pick your first loop

Choose one workflow to start (do not boil the ocean):

- Onboarding / kickoff
- Vendor waits / external dependencies
- Approvals / client bottlenecks

Quick cues: Vendor waits -> dependency owner + scheduled updates.
Handoffs -> explicit transfer + post-handoff update.
Work done, not seen -> done without client-visible update flagged.

Day 1	Pick one loop + one owner. Define what 'done' means.
Day 2	Map entry points (where requests enter before tickets).
Day 3	Enforce the 3 fields (Owner/Action/Update Due).
Day 4	Add one guardrail (silence detection or update enforcement).
Days 5-6	Run it. Do not add scope. Fix obvious hygiene issues.
Day 7	10-minute review: Update Lag + Stale Ticket Rate. Pick one improvement for next week.

Pick one recent escalation where the client asked for status.

Answer:

- 1) Where did the request enter before it became a ticket?
- 2) Who owned the next client-visible update?
- 3) What was your silence trigger – and what happens next?

Close-loop it:

Owner: _____

Next Action: _____

Next Update: _____

Need help operationalizing this?

Tools to help automate closed loops across chat, email, and tickets: <https://www.gtalo.com/>