

Conversations & SLA: Implementation Plan and Team Guide

A concise response to the 11 August proposal: what Blueprint accepts, how Martin will configure it, what the Team account must do locally, and when more automation becomes justified.

DECISION: Martin will configure and verify the account-level Conversations system. The Team account completes only its own user/device settings and operates the queue. Native SLA, AI, and customer-response automation stay off during the baseline.

WHO DOES WHAT

Martin configures and verifies	Team account completes locally	Deferred until evidence
Current-state and opportunity-readiness audit; three shared views; assignment model; protected settings; controlled routing test; cleanup and evidence.	Confirm the shared views; choose assignment/mention Web, desktop, and mobile alerts; allow device permissions; confirm test receipt; then run the twice-daily queue routine.	Native SLA timers; routing or overdue automation; AI/customer auto-replies; voice, SMS, WhatsApp, social, or live-chat expansion.

This is an operating guide, not a request for the Team account to build the system. User-local steps are delegated only because they must be confirmed inside that account or on that device.

WHAT TIM'S AUDIT ESTABLISHED - AND THE CONTROL IT CREATES

11 August finding	Blueprint response
43 conversations; 21 unassigned	Refresh the complete queue before action. Treat the old count as ownership evidence, never as a mutation list.
Phone-centric records; email/SMS/no-show mix	Classify every current channel and one human response obligation per thread. Do not infer channel readiness from message type.
One unrelated Draft workflow; no routing/SLA evidence	Preserve the Draft Journey workflow. Keep native SLA, AI, routing, overdue and customer auto-replies off during baseline.
Users, preferences and mobile receipt not API-proven	Verify both accounts, shared-view permissions and actual Team-device assignment/mention receipt in controlled QA.

Implementation sequence: refresh the audit -> approve exact changes -> configure -> controlled QA -> cleanup -> begin the manual baseline.

1. Response to the 11 August proposal

Approve the proposal's simplicity-first direction. Simplify its operating design to one routine owner, one exception/backup person, two priority classes, three shared views, and measured progression.

Proposal concept	Decision	Blueprint implementation
GHL Conversations is the working queue	APPROVE	If a thread exists in GHL, reply from GHL. Do not answer it separately through Gmail.
Multiple operating roles	SIMPLIFY	Team account owns routine work. Martin handles explicit exceptions and backup. No rotation or extra role labels.
P1 / P2 / P3	SIMPLIFY	Use Urgent and Standard. Do not create priority tags during the baseline.
Cayman business hours	CHANGE	Use Monday-Friday, 09:00-17:00 US/Eastern and declare holiday/absence coverage.
Scheduled queue checks	APPROVE	Team account checks unassigned inbound at 10:00 and 15:00 Eastern each business day.
Manual SLA first	APPROVE	Use internal response standards while native SLA remains off.
Automation later	APPROVE	Add no routing, overdue, workflow, AI, or customer auto-response automation until a measured gate is met.

2. Two-account operating rule

Account/person	Default responsibility	Transfer rule
Team account team@blueprintglobal.io	Assign and handle routine inbound, update the customer, and keep the next action visible.	Mentioning Martin asks for input but keeps Team ownership. Reassign only when Martin must take over.
Martin	Handle matters requiring Martin personally, partner/commercial judgment, sensitive exceptions, or declared backup coverage.	Accept the reassignment or return it with a clear next step.

- Urgent: security/privacy, serious complaints, regulated deadlines, legal/tax/immigration/banking boundaries, immediate payment/recovery issues, or an explicit urgent need for Martin. Acknowledge safely, then escalate.
- Standard: routine prospect, customer, partner, subcontractor, scheduling, and billing-administration enquiries.
- Marking a conversation read is not completion. Completion requires a human reply, documented no-response decision, or explicit handoff.

3. How Blueprint will configure it

A. Readiness gate owned by Martin

Refresh every paginated conversation and API-visible channel, including assignment, latest direction/time, unread/read state, status, source, related contact/opportunity, saved/private/shared views, permissions, notification preferences, native SLA/reporting, workflows, AI, widgets, channel connections, and routing dependencies. Classify one genuine human response obligation per thread without exporting customer content. Reconcile the three managed acquisition pipelines against Blueprint's approved pipeline and relationship rules. Do not bulk-create opportunities. Preserve Won/no-regression, household Additional Contacts, one qualifying relationship opportunity, and the unmapped Book a Blueprint Conversation calendar. Any exact correction is separately approved and verified.

B. Three shared views

Exact view	Filters	Use
01 - Unassigned Inbound	Assigned = No; Last Message Direction = Inbound	Twice-daily assignment queue. Do not require Unread.
02 - Team Account Needs Reply	Assigned To = Team account; Last Message Direction = Inbound	Routine active response queue.
03 - Martin Needs Reply	Assigned To = Martin; Last Message Direction = Inbound	Only deliberately transferred conversations.

C. Targeted user notifications

Account	Target	Responsibility
Team account	Web/in-app, desktop, and mobile for direct conversation assignment and direct internal mention. Leave conversation email and blanket every-message/team alerts off.	Team account signs in, chooses its own preferences, allows browser/mobile permissions, and confirms one controlled receipt.
Martin	Preserve his manually chosen profile settings. Add only a proven missing conversation-specific assignment/mention signal with exact approval.	Martin configures and re-verifies without overwriting unrelated preferences.

Calendar lifecycle, form, document, payment, and conversation alerts are separate control planes. Test the triggering event before calling two alerts duplicates. A saved setting is configuration evidence, not delivery proof; actual visibility and receipt must be tested from both accounts and the Team device.

D. Team-account operating rhythm

When	Action
10:00 and 15:00 Eastern	Open view 01 and assign genuine response obligations.
After assignment	Work from view 02; reply, resolve, or state the next step and timing.
Martin input needed	Add one private internal comment and mention Martin. Do not reassign.
Martin must take over	Reassign to Martin; the thread moves to view 03.
Absence or closure	Declare coverage in advance. No 24/7 promise is implied.

TEAM ACCOUNT SETUP IS FOUR SHORT CHECKS: see the shared views, set assignment/mention alerts, allow device permissions, and confirm the controlled test alert. Martin owns the rest of the configuration.

4. Acceptance test and baseline

Test	Lead	Pass condition
One controlled inbound	Martin	Exactly one conversation; no duplicate contact, opportunity, or conversation.
Unassigned visibility	Both	The thread appears in view 01 for both accounts with compatible permissions.
Assign to Team	Martin	It moves from view 01 to view 02; Team receives exactly one assignment signal.
Mention Martin	Team account	Martin receives one mention signal; the contact cannot see the private comment; ownership stays with Team.
Reassign to Martin	Team account	It moves from view 02 to view 03; Martin receives the intended signal.
Reply from GHL	Team account	One customer thread with approved human sender/reply behavior; no separate Gmail reply.
Desktop/mobile receipt	Team account	Only assignment/mention signals appear; no blanket team noise.
After-hours inbound	Martin	It enters once without an unsupported immediate-response promise.
Failure / absent owner	Both	A failed send, absent owner and reassignment remain visible; no thread is orphaned or handled twice.
Protected controls	Martin	Native SLA, AI, workflow/customer auto-replies and unapproved channel automation remain off.
Cleanup	Martin	Exact QA data and approved test mail are removed; receiver health is clean and reconciliation is zero-diff.

Manual baseline

Standard	Internal expectation
Urgent	Same-business-day human acknowledgement and immediate safe escalation when needed.
Standard	Acknowledgement within one business day and a useful answer or committed next step within two business days.
Coverage	Monday-Friday, 09:00-17:00 US/Eastern. Planned absence or closure requires a declared owner/window.

Track four monthly counts only: **eligible inbound conversations, routine response misses, Urgent misses, and duplicate replies**. Eligible inbound means a genuine prospect/customer/partner/subcontractor message reasonably requiring a human response. Exclude spam, tests, internal chat, automated notices, out-of-office replies, delivery failures, and no-response-needed messages. Correct live exceptions immediately; review the four aggregate counts monthly because launch volume is small. Increase review frequency only if volume or repeated misses make monthly review too slow.

BASELINE COMPLETE: at least 30 days and 25 eligible inbound conversations, with the Team account operating the queue and both accounts reviewing the results.

5. Practical progression thresholds

During the manual stage, review the four baseline counts. During an SLA pilot, add one temporary count: false off-hours breaches. These gates govern internal adoption; they are not customer promises.

Stage	Minimum evidence and setup	Advance / keep only when	Correct, stop or revert when
1 Manual baseline	Run the shared views and twice-daily checks for at least 30 days and 25 eligible inbound conversations . Keep native SLA off.	Pilot Stage 2 only if, after process correction, either 3+ routine misses recur in each of 2 consecutive months , or volume is 50+ in each of 2 consecutive months and checks are demonstrably unreliable.	Any Urgent miss, duplicate reply , or 3+ routine misses in one month requires immediate process correction. One incident is not a technology trigger.
2 Email SLA pilot	Both accounts approve; HighLevel supports Blueprint business hours or both accept seven-day coverage. Run Email only for 30 days ; exclude workflow/AI replies; admins only dismiss. Require 25 tracked messages ; extend if smaller.	Keep only if it clarifies ownership. Test one automation only if the same preventable routing or overdue problem occurs 3+ times during the pilot.	Turn off after 3+ false off-hours breaches , any unresolved message hidden by dismissal, or materially obscured ownership.
3 One automation	Add one internal routing <i>or</i> overdue alert for the single proven problem. Run for 30 days . No automated customer reply without separate approval and QA.	Keep only if recurrence falls from 3+ to 0-1 , with zero duplicate replies and zero wrong-owner routes .	Roll back immediately for any duplicate customer reply or wrong-owner route. Remove it if recurrence remains 3+ .

False off-hours breach: a timer breach caused only by HighLevel counting nights, weekends, or declared closures outside Blueprint coverage - not a genuine miss during covered hours.

JOINT DECISION RULE: move one stage at a time only after the evidence period and sample are complete. Martin and the Team account must both approve. If a gate is not met or they disagree, stay at the current stage.

Explicit exclusions

- Do not turn native SLA into a public promise without a separately approved customer-service policy.
- Do not let workflow or AI replies hide the absence of a human response during a pilot.
- Do not activate voice, outbound SMS, WhatsApp, social, or live-chat SLA merely because a channel appears in HighLevel.
- Do not reopen settled calendar notifications, reusable email assets, forms, Journey/opportunity automation, documents, or commerce configuration.

Channel-specific activation gates

Deferred channel	Required before activation
Voice	Real missed-call, voicemail, routing, recording/consent, notification, callback and duplicate-response QA.
SMS	Consent, A2P, STOP/HELP/DND, sending number, delivery/error path and US/Canada QA.
WhatsApp / social / live chat	Connection, opt-in, template/billing where applicable, routing, responder coverage and end-to-end delivery QA.

Reference basis

Tim's GHL Conversations, SLA & Notification Proposal (11 August 2026); Blueprint's approved pipeline, notification, messaging, and operating controls; and the current live Blueprint Conversations SLA inspection (20 August 2026).