PHANTOM WORKFLOW

Inbound response workflow planning

Map inquiry receipt, staff ownership, and follow-up before automating inbound response.

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This is a planning guide for your own workflow. It is not a client result or a finished build. The guide text matches the web page.

Read this whitepaper online

Define the completion event

An inbound inquiry is not the same as a qualified opportunity, a booking, or a completed job. Define each state and the staff member responsible for advancing it. A received form or an automated acknowledgment should not be counted as a sale.

Start with the channels the business already uses, the information supplied by the prospect, and the decisions the team makes before responding. Record which messages are approved and which requests require a person.

Map the current handoffs

Follow an inquiry from first contact to its final disposition. Record the task owner, software record, waiting time, and reason for each manual handoff. Use the business's own records to identify unanswered inquiries and repeated entry.

Separate customer-supplied facts from enrichment or staff interpretation. A prospect correction should not be overwritten by a stale background record. Keep incomplete information visible for review.

Confirm supported access

HubSpot documents contact management through its CRM API. Twilio documents incoming-message webhooks. These capabilities establish possible integration building blocks, not a completed Phantom implementation.

For the actual workflow, verify the account's access, required record operations, and staff-approved communication rules. Do not infer booking permissions from contact access or treat a message as proof of a delivered handoff.

Pilot and measure

Test duplicate inquiries, missing contact details, requests outside coverage, and an unavailable staff destination. Verify both the final business record and the unresolved review queue.

Measure response and disposition using a defined period and comparable task categories. Record manual corrections, follow-up work, and supervision effort. This guide supplies no industry conversion benchmark or guaranteed return.

Decisions to write down

Checkpoint	Decision
Inquiry	What starts the workflow, and how is the original request identified?
Owner	Who must accept the next step, and what happens if they are unavailable?
Record	Which system owns the current inquiry status?
Measurement	Which event represents completion, and how are corrections counted?

Sources

HubSpot: CRM API Contacts. Checked 2026-10-05.

Twilio: Incoming message webhook requests. Checked 2026-10-05.

Related guides

How to plan missed-call text-back for contractors

How to plan B2B inquiry qualification and enrichment