

Triage Guide — Inside Sales

SAMPLE DOCUMENT — FOR TRAINING PURPOSES ONLY

Triage Reference Guide — Inside Sales

Urgency Criteria

Urgency is driven by SLA timers and customer impact. Breached SLAs are always urgent. Multiple items from the same source may indicate a systemic issue.

Priority Scale (Days_Since_Contact)

- **1-3 days:** URGENT — act today
- **4-7 days:** ATTENTION — schedule this week
- **8-14 days:** ROUTINE — plan for next week
- **15+ days:** LOW — monitor only

Categories

- **Inbound Web**
- **Outbound Cold**
- **Referral**
- **Partner Lead**
- **Event**

Status Values

- **Active**
- **Stale**
- **Won**
- **Lost**

Escalation Rules

1. Any item categorised as URGENT that has been in queue for more than 24 hours
2. Multiple items from the same source or merchant (pattern indicates systemic issue)
3. Items with contradictory data (status says one thing, priority says another)
4. Items you cannot categorise with the information available

The 5 Failure Modes (check your output)

1. **Miscalculation** — Are the counts in your summary correct? Count manually.
2. **Misclassification** — Did the AI put ambiguous items in the right category?
3. **Hallucinated references** — Do any links, IDs, or cross-references actually exist?
4. **Overconfident language** — Does the output say "definitely" when it means "likely"?
5. **Missing context** — What do you know from experience that the data doesn't show?