



SPLICE-IN READINESS: WHAT TO GATHER BEFORE DISCOVERY

The systems, locations, roles, consent rules, and quiet-hours policies discovery will ask for, in one worksheet you can fill in ahead of the call.

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Discovery is the first step of an engagement. We inventory your systems, locations, roles, and consent rules, and confirm which connectors exist today and which we would build. You get a written inventory and a connector plan. Your part is API access and one operations owner.

Most of the time on a discovery call goes to finding out things you already know. This worksheet moves that work ahead of the call. Fill it in, bring it, and the demo turns into discovery.

How to use this worksheet

- One person owns it. That person is usually the operations owner (see the last section). They do not need every answer; they need to know who has each one.
- Fill in what you know. Leave a blank where you don't. A blank is useful; a guess is not.
- Keep the answers short. Vendor names, counts, times, and yes or no. Discovery is where we ask the follow-up questions.
- Do not send credentials with this worksheet. API access is granted during onboarding, to a server-side connector, never by email.

Section 1: Your systems

DialSplice splices your CRM, your system of record, and your phone system into one agent screen. Your stack stays exactly where it is. Discovery needs to know what each system is, who administers it, and whether it exposes an API.

Telephony

Voice, SMS, and transfers stay in your provider. Agents place calls in their own telephony app through click-to-call; DialSplice never originates the call and never holds the audio.

- Provider: _____
- Admin owner (name, role): _____
- API or webhook access available (yes / no / unsure): _____
- Number of phone numbers, and whether each location has its own caller ID: _____
- Where voicemail and recordings live today: _____

CRM

The CRM stays the complete customer-interaction record. DialSplice reads contacts and opportunities under your scopes, routes inbound events into the queue, and writes dispositions back.

- Vendor: _____
- Admin owner: _____
- API access available: _____
- Where new leads arrive (web forms, inbound messages, missed-call webhooks):

- Where consent and do-not-contact flags are stored: _____
- A migration in progress or planned (from what, to what, when): _____

EHR or system of record

The system of record owns the appointment and the patient record. Bookings write there with identity resolved first; the CRM is updated from the same event, so the two never disagree.

- Vendor: _____
- Admin owner: _____
- API access available: _____
- Does it hold the patient record, the appointment, or both: _____
- Can it report whether a record exists at more than one location: _____
- Appointment outcomes it records (kept, cancelled, no-show): _____

Data platform (optional)

When you want the facts in your own warehouse, DialSplice exports content-free facts to your data platform on AWS, Microsoft, or Google Cloud. Skip this section if you do not have one yet.

- Platform: _____
- Owner: _____
- Who governs the schema: _____

Notification channels

Alerts name the work and the location, never the contact. They can post to Microsoft Teams or Slack, alongside browser push, mobile push, SMS, and email.

- Channels your managers already watch: _____
- Who administers them: _____

Section 2: Your locations

Configuration is per location and grows with you. Every work item carries organization and location scope, and an unknown or ambiguous location fails closed, so the list has to be complete before anything goes live.

Fill in one column per location. Add columns as needed.

FIELD	LOCATION 1	LOCATION 2
Name	_____	_____
State	_____	_____
Time zone	_____	_____
Business hours (local)	_____	_____
Outbound caller ID	_____	_____
Languages served	_____	_____
Observed holidays	_____	_____

- Total number of locations: _____
- Locations that share a phone number or a caller ID: _____
- Locations that open or close on different days than the rest: _____
- The location you would start with, if you start with one: _____

Section 3: Roles and scopes

Capability and location scope are assigned per role and validated at request time, not at login. An agent only finds contacts they are allowed to see. Discovery needs the roles you run today and which locations each one covers.

- Number of agent seats: _____
- Number of managers: _____
- Admins (who can change configuration): _____
- Compliance or security lead (who will review the ledger and sign the BAA): _____

For each role, note the locations it covers and what it may do.

ROLE	LOCATIONS COVERED	CAN BOOK INTO THE EHR	CAN TAKE PAYMENTS
Agent	_____	_____	_____
Manager	_____	_____	_____
Admin	_____	_____	_____

- Agents who work more than one location: _____
- Managers who approve deferrals for more than one location: _____
- Overnight or after-hours coverage, and who reviews it in the morning: _____

Section 4: Consent rules

Before any touch, a contactability preflight checks consent, local time, attempt caps, and channel blocks, per channel. It is re-validated at execution time, not at the start of the shift. To build that check, discovery needs to know what counts as consent for you and where it is recorded.

For each channel:

CHANNEL	WHAT COUNTS AS CONSENT	WHERE IT IS RECORDED
Voice	_____	_____
SMS	_____	_____

Email _____

- Where a do-not-contact request is recorded today: _____
- Who can mark a contact do-not-contact: _____
- Consent rules that differ by state or by location: _____
- Channels you do not use at all: _____

Section 5: Quiet hours, cadence, and caps

Retries follow a set cadence with an attempt cap, so nobody calls a contact five times in an afternoon. A callback that drifts toward its SLA is routed to a manager for approval instead of quietly slipping. These rules are configured per location.

Fill in what you enforce today, even if it is informal.

RULE	LOCATION 1	LOCATION 2
Quiet hours start (local)	_____	_____
Quiet hours end (local)	_____	_____
Retry cadence (e.g. 2h → 4h → next business day)	_____	_____
Attempt cap	_____	_____
Callback SLA window	_____	_____
Who approves a deferral past the window	_____	_____

- Holidays on which no outbound contact should happen: _____
- Channels with different quiet hours than voice: _____
- What happens today when an attempt cap is reached: _____

If you have not defined these, say so. The callback SLA playbook in this series walks through choosing them.

Section 6: Dispositions

Every outcome is a disposition from your list. The list is part of the location configuration and is versioned like everything else. Start with what your agents record today.

- Current disposition list (as written, in order): _____
 - Dispositions that trigger a next step (a callback, a booking, a hold): _____
 - Dispositions that exist but are never used: _____
 - Where dispositions are recorded today (CRM field, note, spreadsheet): _____
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Section 7: Guidance

Scripts and playbooks are versioned and approved before an agent sees them beside a contact. If you have scripts, discovery will ask for the current versions and who approves changes.

- Where agent scripts live today: _____
 - Who approves a script change: _____
 - Scripts that differ by location or language: _____
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Section 8: The operations owner

Onboarding asks for one operations owner. This person reviews each configuration revision, approves it, and is the one we call when something changes. They do not need to be technical. They need to know your locations, your rules, and who to ask.

- Name and role: _____
 - Time available during the build and beta (hours per week): _____
 - Who covers when they are out: _____
 - Agents and a manager available for beta testing: _____
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Before the call

Run through this list once the sections above are filled in.

- ☐ Every system in Section 1 has a named admin owner.
 - ☐ You know, or know who knows, whether each system exposes an API.
 - ☐ Every location has a time zone and business hours.
 - ☐ Every role has a list of locations it covers.
 - ☐ Consent is defined for each channel you use, with a place it is recorded.
 - ☐ Quiet hours and an attempt cap exist for at least one location, even if provisional.
 - ☐ The disposition list is written down as agents use it.
 - ☐ The operations owner is named and has time blocked.
 - ☐ Your compliance lead knows a BAA will be signed and has read the security page.
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What discovery produces

At the end of discovery you get a written inventory and a connector plan: which connectors exist today, which we would build, and what each one reads, writes, and never returns. The quote follows, in writing, before any work starts. Nothing in this worksheet commits you to anything. It makes the first conversation shorter and the second one possible.