The Case Management "Fidelity Pulse Check"

Identify where your in-house systems are thriving and where "administrative drift" may be occurring.

WARM HANDOFF · LEAKY BUCKET· INTELLIGENCE HUB

GOAL

To help you identify where your in-house systems are thriving and where they may be experiencing "administrative drift." Select the response that best describes your team's current practice.

1 The "Warm Handoff" Metric — PILLAR 1

Since our masterclasses, how would you rate your team's consistency in performing live introductions (Warm Handoffs) versus just giving out a phone number (Cold Referral)?

- ○ **HIGH FIDELITY**
  We perform warm handoffs for almost every client.
- ○ **MODERATE DRIFT**
  We perform warm handoffs for high-stakes cases only.
- ○ **HIGH DRIFT**
  We have largely returned to handing out contact information (Cold Referral).

2 The "Leaky Bucket" Check — PILLAR 2

Of the new staff hired since our masterclasses, what percentage have been fully onboarded using the standardized Case Management pathways?

- ○ **100% — FULL FIDELITY**
  It is a mandatory part of our in-house orientation. All new staff complete the pathways.
- ○ **50 – 75% — MODERATE DRIFT**
  We are still manually training some staff outside of the standardized pathways.
- ○ **UNDER 50% — HIGH DRIFT**
  New hires are mostly"learning as they go" without structured onboarding.

3 The Practitioner Intelligence Hub — PILLAR 3

How often is your team accessing the searchable Knowledge-Base and curricula to guide their daily sessions and client work?

- ○ **DAILY / WEEKLY — HIGH FIDELITY**
  It is the team's"go-to"resource for guiding daily sessions and client interactions.
- ○ **RARELY — MODERATE DRIFT**
  Staff rely more on old files or external searches rather than the Intelligence Hub.
- ○ **NEVER — HIGH DRIFT**
  Staff have forgotten how to access it or were never properly onboarded to the system.

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