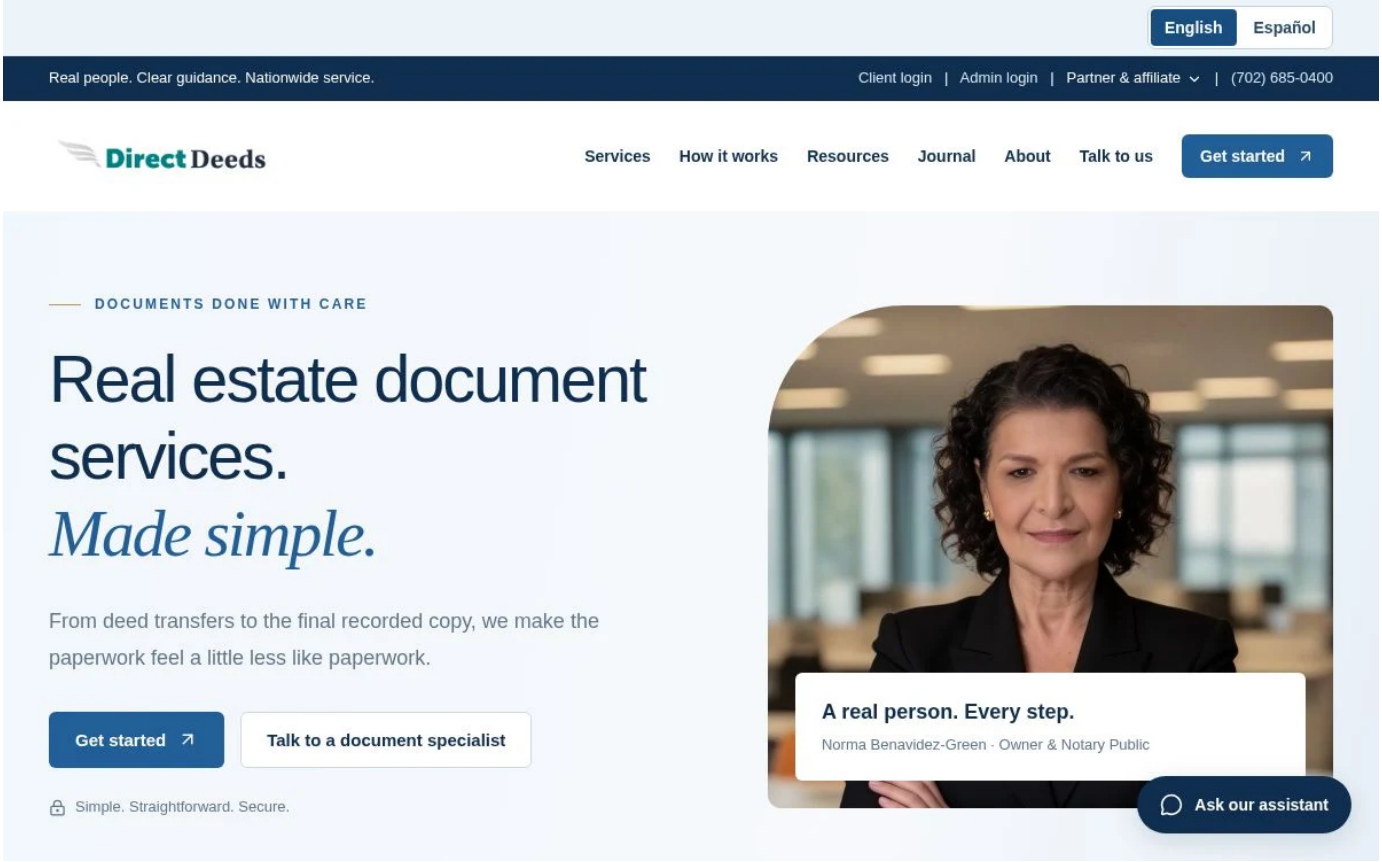
SELECTED WORK 03 / DOCUMENT SERVICES

Direct Deeds

Keep customer requests and follow-up together.

Direct Deeds combines a bilingual service website with the workspaces needed behind a document-service business. Customer intake, relationship records, order stages, client visibility, and partner tools are organized around the same service journey. Marketing planning and public articles extend the platform beyond a brochure site.

DIRECTDEEDS.COM



THE BUSINESS NEED

Customer requests, documents, and follow-ups are scattered across messages and spreadsheets.

What MEFH built

Give each participant a useful view of the service process while keeping requests, responsibilities, and follow-up organized.

01 Bilingual website & intake

English and Spanish service pages introduce the offering and guide visitors toward a request. The bilingual experience addresses how customers understand the service before intake. For a similar business, both language versions need consistent terminology, clear service boundaries, and a person responsible for reviewing changes.

02 CRM & follow-up dashboard

The CRM and follow-up dashboard organize customer records, order stages, ownership, tasks, and next-contact dates. These are practical operating fields: they help staff identify who is responsible and what should happen next. Their value depends on accurate updates as the work progresses.

03 Customer portal

The customer portal provides a place to view progress, documents, and messages. It creates a defined destination for an ongoing relationship instead of making every update a new search through email. A comparable implementation should define which information customers can see at each stage.

04 Partner & affiliate portals

Partner and affiliate portals support referrals, approvals, and role-specific progress views. Different participants need different information, so the platform separates their experiences. The transferable idea is structured collaboration with appropriate visibility, not a promise that every partner receives the same access or economics.

05 Marketing dashboard

The marketing dashboard includes action plans, social drafts, a content calendar, visibility checks, and CRM totals. It organizes work that the business can review and execute. Social drafts are not automatically published posts, and available internal totals are not a substitute for connected external analytics.

06 Articles & search foundations

The public journal, article feed, sitemap, and crawl rules provide a foundation for publishing and discovery. Useful service explanations can answer questions before intake. Search foundations make content easier to organize and understand; they do not guarantee search rankings, AI citations, or qualified customer volume.

One service request, several coordinated views

Illustrative use of the delivered features; this is not a record of an individual customer transaction.

01

Understand the service

A customer reviews service information in the appropriate language and chooses a guided request path. Clear explanations help distinguish what the business offers from questions that require professional advice.

02

Create a usable intake

The request supplies a starting record for staff review. The team confirms the request and required next steps rather than treating an online submission as automatic acceptance or completed work.

03

Assign and manage the work

Staff use customer records, stages, tasks, and next-contact dates to organize responsibility. A clear owner helps prevent a request from becoming everyone's problem and nobody's next action.

04

Keep participants informed

Customers use their portal for relevant progress, documents, and messages. Partners and affiliates receive the views appropriate to their role, with visibility determined by the relationship and access rules.

05

Maintain the relationship

The business reviews outstanding tasks and marketing activity. Public educational content can support future inquiries while the CRM provides context for follow-up with existing relationships.

THE TRANSFERABLE IDEA

The practical value is the connection between the public promise and the internal process required to deliver it.

The work behind the experience

Bilingual service pages lead to intake. Customer and order records support staff ownership and follow-up. Customer and partner portals provide role-specific views; the marketing workspace supports planning and internal totals.

Intake and assignment

Review new requests, resolve missing information, assign responsibility, and select the next operational step. For an adaptation, define the criteria for moving between stages before configuring the workflow.

Portal and partner management

Maintain role assignments and review the information shown to each participant. Use sample accounts during acceptance to confirm that customers and partners see the intended records and staff-only information remains appropriately limited.

Marketing execution

Use the planning workspace to organize content, social drafts, and follow-up priorities. Assign a person to review and publish social posts manually. Treat Search Console data as unavailable until the connection is configured and checked.

SUGGESTED OWNERSHIP

Service lead

Intake standards and stage definitions

Assigned staff

Tasks, records, and customer updates

Portal administrator

Access and partner relationship setup

WHY THE DESIGN WORKS THIS WAY

Design around the handoff

A website request is the beginning of service delivery; the next owner and next action need a place in the system.

Separate participant views

Customer, staff, and partner needs overlap, but they do not require identical access to records or internal work.

Make status actionable

Stages and dates are useful when they tell the team what to do next, rather than merely decorating a dashboard.

What to measure

Suggested measures, not reported results. Establish a baseline, verify the available data, and agree on targets before evaluating performance.

MEASURE	DEFINITION	EVIDENCE NEEDED	WHY IT MATTERS
Intake completeness	Requests with required information ready for review	Intake and staff review records	Identify confusing questions or missing instructions.
Assignment delay	Time from request creation to assigned ownership	Record timestamps where available	Locate work waiting for a responsible person.
Follow-up reliability	Due tasks completed or rescheduled with a reason	Task and next-contact records	Review whether customer commitments are being handled.
Stage age	Elapsed time in each agreed service stage	Order history or an added stage-change log	Locate operational bottlenecks without inventing a service target.
Partner request quality	Referrals that meet agreed intake criteria	Referral records and review outcomes	Improve partner guidance and the handoff process.

ACCEPTANCE CHECKS FOR A SIMILAR PROJECT

- ✓ Compare critical English and Spanish service information.
- ✓ Verify customer and partner visibility with appropriate test roles.
- ✓ Distinguish manual marketing work from connected reporting.
- ✓ Follow a labeled test request from intake to staff ownership.
- ✓ Confirm the next-contact task is visible to its owner.

Could this work for your business?

WHERE IT FITS

This pattern is useful when a service business has several handoffs and customers need visibility while work is underway. It is a stronger fit for a defined process with known roles than for an organization that has not yet decided how requests should be assigned and completed.

A USEFUL FIRST SCOPE

Map one service from initial inquiry to completion, define the roles involved, and agree on the minimum intake fields. Build the customer record, stage structure, and next-action ownership around that service. Add partner views and broader marketing tools after the core handoff has been validated.

QUESTIONS TO BRING TO A CONVERSATION

- What are the actual stages from request to completion?
- Which facts must be collected before staff can begin?
- What should customers and partners see at each stage?
- Which follow-up commitments are most often missed today?

PROJECT SCOPE NOTES

- Marketing features include planning, drafts, and CRM totals. Social posting is manual; Search Console is not connected in the documented snapshot.
- The platform supports service coordination. It does not replace the business's responsibility for document accuracy, customer eligibility, or professional review.
- No revenue, turnaround-time improvement, referral volume, or cost savings are asserted in this case study.

POSSIBLE ADAPTATIONS

Professional services

Client intake, progress, and documents

Referral businesses

Partner handoffs and relevant status views

Multi-step services

Assigned work, follow-up, and customer portals

Discuss something like this for your business

View the project **Read the case study online**

Project snapshot: November 3, 2026. Based on project-source review and the published MEFH case-study content. Workflows and evaluation plans are illustrative; no measured business results are asserted.