

Prepare your lead follow-up workflow

Connect new enquiries with useful replies, ownership, and a clear next action.

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Map where enquiries arrive

List your website forms, ad forms, inboxes, messaging channels, and CRM. Explain how an enquiry reaches the team today, what information is missing, and where follow-up stops. Include approximate volume and working hours.

Agree useful follow-up rules

- Qualification questions and the conditions for booking, routing, or human review.
- Who owns each enquiry, how duplicates are handled, and when the sales team is notified.
- Approved channels, contact permissions, opt-out handling, and when messages must stop.
- The fields and stages your CRM should receive.

Measure the right things

Choose a baseline and an agreed way to measure response time, completed follow-ups, qualified enquiries, or bookings. These measures help review the workflow; they are not a guarantee of sales or revenue.

Your checklist

0/3 complete

- ☐ List enquiry sources and CRM fields.
- ☐ Agree ownership and stop rules.
- ☐ Prepare sample messages without personal data.

A USEFUL NEXT STEP

Choose one enquiry source for the first scope.

Your signed proposal and agreement define the final scope, fees, responsibilities, and terms.

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