

1. Lead Capture Sources

Where do leads currently come from?

- Website forms
- Landing pages
- Facebook / Instagram ads
- Google ads
- Social media DMs
- Phone calls
- Referrals

Check all that apply

- All leads go into one system
- You always know the lead source
- No leads live only in emails or messages

2. Speed-to-Lead Rules

How fast do leads hear back?

- Leads get a response in under 5 minutes
- Missed calls trigger an automatic text
- Leads receive an instant confirmation message
- One person owns follow-up responsibility

If your response time is over 15 minutes,
you're already losing deals.

3. Follow-Up Automation

What happens after the first touch?

- Follow-up emails are automated
- SMS reminders are in place
- Follow-ups last at least 7–14 days
- Appointment reminders are sent automatically

Most deals close after multiple touches.
No follow-up = no sale.

4. Pipelines & Stages

Can you see every deal clearly?

- New Lead
- Contacted
- Call Booked
- Proposal Sent
- Won / Lost

- Every lead is in one clear stage
- You can instantly see stalled deals

5. Reporting & KPIs

Do you know what's actually working?

- Leads per week
- Average response time
- Calls booked
- Deals closed
- Revenue generated

If you don't track this weekly,
you're guessing.

6. What to Consolidate or Eliminate

Where complexity kills conversions

- Multiple inboxes handling leads
- Spreadsheets used as a CRM
- Manual reminders and follow-ups

- Tools doing overlapping jobs
- Missed calls or messages

One system should run everything.

Your Audit Result

- ✓ **0–10 checks** → Leads are leaking badly
- ✓ **11–20 checks** → System exists but underperforms
- ✓ **21–28 checks** → Strong base, needs optimization

Next Step (Conversation Starter)

If you checked “no” more than a few times,
the issue isn’t traffic.

It’s what happens *after* the lead comes in.

Book a Free Lead-to-Close Review

We’ll walk through your results and show you:

- where deals are getting stuck
- what to fix first
- how to convert more leads without more ads