

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