AISaGrowth

Lead follow-up audit

A practical 5-step checklist for agencies

01 Map lead sources

Record the channels where inquiries arrive: website, social inboxes, referrals and email. Mark the owner of each channel.

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02 Measure response speed

Review five recent inquiries. Note when each arrived, when a useful response was sent, and whether a follow-up happened.

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03 Choose qualification questions

Write three to five questions that help determine service fit, budget readiness, timeline and decision-maker involvement.

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04 Review booking handoffs

Trace a prospect from first contact to confirmed appointment. Identify manual handoffs, unclear responsibilities and missed confirmations.

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05 Outline a follow-up sequence

Write a simple three-touch follow-up plan with an owner and a clear stop rule when the prospect opts out.

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What to do next

Circle your two largest bottlenecks. Decide which one to test first. If you want help, request a free 15-minute AI automation discovery call.

This worksheet is a self-assessment, not a guarantee of results. Do not include confidential customer data.