



The Lead Waste Checklist

Eight quick checks to see where new-family inquiries are quietly slipping away.

Answer honestly — the goal is to see the gap, not to grade yourself. Two minutes, no math.

1

Are new inquiries answered in under 5 minutes?

The families you're already paying to reach are calling other agencies too. The first to respond usually wins.

☐

Yes

☐

No

2

Do your outbound calls show up branded — not flagged as spam or “scam likely”?

An unbranded number gets ignored or blocked before the family ever hears it ring.

☐

Yes

☐

No

3

Are your emails landing in the inbox, not spam or promotions?

A well-written follow-up email that never gets opened isn't a follow-up — it's a wasted attempt.

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Yes

☐

No

4

Is every new lead handled the same way, every time?

If the process depends on who's free that day, it isn't a process — it's a coin flip.

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Yes

☐

No

5

Do missed calls get a fast callback?

A missed call with no quick return is one of the most common, least-noticed leaks in intake.

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Yes

☐

No

6

Is follow-up consistent, with a cadence that runs out to 90 days?

Most agencies stop after one or two tries. Families who take longer to decide are still winnable — if someone's still reaching out.

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Yes

☐

No

7

Is follow-up tracked in a system — not left to memory?

If the only record of a follow-up is someone's memory of making it, it isn't tracked. It's a guess.

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Yes

☐

No

8

Is there real after-hours coverage — nights, weekends, and holidays?

Inquiries don't wait for business hours. A lot of the best ones come in after everyone's gone home.

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Yes

☐

No

If you have more than 2 “No” answers, it might be worth a conversation with us.

Book a free Lead Waste Analysis. We check how your calls display across the major carriers, whether your emails are landing in the inbox, and where follow-up is breaking down, then show you how to close each gap.

How to read your answers

Every “No” is a specific place a paying family could be slipping to another agency. None of these require new hires or new software to fix — they require a system that catches what a busy team can't always catch by hand.