

A SOURCES & ATTRIBUTION

Every active lead source is named (site forms, phone, chat, marketplaces, referrals, paid).

Web forms record source / medium / campaign (UTMs or equivalent) on every submission.

Phone-heavy funnels use consistent tracking for measurable channels (DNI, call analytics, or rep codes).

Offline and referral leads have a defined capture path—not handled only from memory.

Notes

B RESPONSE SPEED & OWNERSHIP

Target time to first human reply is defined and known to the team.

Nights and weekends have a defined path (auto-reply, booking link, on-call, or stated limitation).

Each inbound lead has a clear owner or queue—no ambiguous "someone will grab it."

Handoff between CSR, sales, and ops / field is documented (who logs the lead, who confirms the booking).

Notes

C CRM & RECORD QUALITY

One system of record exists; inboxes and spreadsheets follow explicit rules if still in use.

Minimum fields are enforced (contact, intent, geography or service line, original source).

Duplicate and re-entry handling is defined (existing customer, repeat fills, same phone).

Disqualify, DNC, and "not a lead" outcomes are logged—not silently deleted.

Notes

D FOLLOW-UP & PIPELINE

A first-week touch plan exists (count and channel: call, SMS, email).

Core follow-up messages use templates—not fully one-off copy every time.

Scheduling uses one preferred booking or estimate process, linked in outreach where relevant.

Stale leads have a revisit or close-out rule—not indefinite limbo.

Notes

E MEASUREMENT & REVIEW

Lead volume by major source is reviewed at least monthly.

Lead-to-booked (or lead-to-job) rate is known or estimated for key sources.

Where media spend exists, cost per lead and per booked job is tracked or estimable.

You pick one priority fix per quarter from the data—not many parallel unfocused initiatives.

Notes

TOP PRIORITIES (NEXT 30 DAYS)