

The speed-to-lead checklist for service businesses

For contractors, roofers, coaches, consultants and agency owners who get leads by phone, web form or DM.

30 checks · 10 minutes

Most leads are not lost on price. They are lost in the hours between the enquiry and the first real answer. Tick what is already true in your business. What is left is your fix list.

01 First response

- ☐ **Every web form gets a reply within 5 minutes, by text and email**
The first business to answer usually gets the conversation, and a lead who waits keeps calling other companies.
- ☐ **Facebook, Instagram and Google messages get answered as fast as forms**
A DM is a lead too. When it sits in a phone nobody checks, it disappears without a trace.
- ☐ **Every channel lands in one inbox your whole team can see**
When leads are spread across four apps, the one in the app you did not open today is the one you lose.
- ☐ **The first reply asks a question, not just "thanks, we'll be in touch"**
A question starts a conversation. A receipt tells the lead to keep shopping.
- ☐ **Each new lead has one named person responsible for the next step**
When everyone can answer, nobody does, or two people call the same lead.

02 After hours and on the job

- ☐ **A lead who writes at 9 PM gets an answer that night, not the next morning**
Evenings and weekends are when owners and homeowners finally have time to look for help.
- ☐ **Leads still get answered while you are on a roof, on a job site or in a session**
The hours you are busy doing the work are the hours leads keep coming in.
- ☐ **Weekend enquiries are handled before Monday**
By Monday, a Saturday lead has already booked someone who answered on Saturday.
- ☐ **When you are away, a lead still gets a reply and a way to book**
An out-of-office message stops the sale. A booking link keeps it moving.

03 Missed calls

- ☐ **Every missed call gets an automatic text within a minute**
Most callers will not leave a voicemail. A text back keeps them from dialling the next number on the list.
- ☐ **Missed calls are logged as leads in your CRM, not only in your phone history**
A number in a call log is easy to forget. A lead with a task is not.
- ☐ **Your voicemail tells callers how to get the fastest answer (text or book online)**
A caller who hears a clear next step takes it instead of hanging up.
- ☐ **There is a rule for when missed calls get a call back, and someone owns it**
"I'll call them back later" without a rule turns into never.

04 Qualification

- ☐ **You know the 2 or 3 questions that tell a good lead from a bad one**
Without them, you spend the same time on a tire kicker as on your best job of the month.
- ☐ **Those questions get asked in the first exchange, before anyone books time**
Asking early protects your calendar and shows the lead you take their project seriously.
- ☐ **Answers are saved on the contact record, not in someone's notebook**
Whoever picks up the lead next should not have to ask the same questions again.
- ☐ **Leads who are not a fit get a polite answer and a referral, not silence**
A clear no protects your reputation and keeps the referral door open.

05 Booking

- ☐ **A qualified lead can book a call or an estimate without phone tag**
Every back-and-forth about times is another chance for the lead to go quiet.
- ☐ **Bookings land in the calendar you actually use, with the lead's answers attached**
You walk into the call or onto the site already knowing what they need.
- ☐ **Every booking sends an instant confirmation with the time, address or link**
A confirmation turns "maybe" into a commitment the lead can find again.
- ☐ **Leads can reschedule themselves instead of cancelling**
A moved appointment is still a sale in progress. A cancelled one usually is not.

06 Reminders and no-shows

- ☐ **Reminders go out the day before and an hour before, by text**
People rarely skip on purpose. They forget, and a text is the message they actually read.
- ☐ **Every no-show gets an automatic "let's find another time" within the hour**
Re-booking right away saves most of them. Waiting a week saves almost none.

07 Follow-up on quotes and proposals

- ☐ **Every quote or proposal gets a follow-up within 48 hours of sending**
This is when the lead is comparing. Being the one who checks in is often the difference.
- ☐ **Follow-up continues for at least 2 weeks, by text and email, until a yes or a clear no**
Most people decide later than you expect, and a single check-in rarely catches the moment.
- ☐ **Follow-up stops automatically the moment the lead replies or books**
Nothing looks worse than an automated nudge after someone has already said yes.
- ☐ **Leads who went quiet in the last 6 months get a check-in at least once a quarter**
Old leads already know you. Timing changes, and a short message costs you nothing.

08 Tracking

- ☐ **You can see your average response time to new leads, in minutes**
If you do not measure it, you will assume it is fast. Most owners are surprised when they look.
- ☐ **Every lead has a source recorded (Google, referral, Facebook, website)**
You cannot put more money behind what works if you do not know what works.
- ☐ **Every open quote sits in a pipeline stage you can see at a glance**
A pipeline you can read in seconds shows which deals need a nudge today.

Score: _____ of 30

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