Lead follow up checklist

Go through this list once with the person who picks up your enquiries. Tick what is already in place. Sort out what is still open first. Only then automate.

1. Your channels

Channel	Where does it come in?	Done
Contact form	Which address does it mail to, and does anyone read it?	☐
Email	Shared inbox: who owns it?	☐
Phone	Where does the call note end up?	☐
Social media	Who reads the DMs, at weekends too?	☐

2. Three details per enquiry

Detail	What you record	Done
Who and how to reach them	Name, company if there is one, phone or email	☐
What the question is	The customer's own sentence, not summarised	☐
When and through which channel	Date and time, plus the channel	☐

3. Owner and first action

Agreement	How you record it	Done
One list	Every enquiry is in one sheet or CRM, phone calls too	☐
Owner rule	Per service, per region or in order of arrival	☐
Stand-in	Every owner has a fixed stand-in	☐
Response time	A time you can meet in a busy week too, stated in your confirmation	☐
Picked up	The customer has heard from a person and there is a next action with a date	☐

4. What you automate

Part	Who does it	Done
Confirmation with your response time	Workflow, text written once by you	☐
Recording in the list	Workflow, you check the question	☐
Assigning by your rule	Workflow, you handle exceptions	☐
Reminder after your response time	Workflow, you respond	☐
The conversation with the customer	You	☐

Do not automate
An AI that answers on your behalf without anyone reading along.
Assigning while there is no owner rule yet.

For the article "Lead follow up: so no enquiry gets left behind". Status as of 10 November 2026.