

Map Your Lead Flow

A one-page worksheet for turning inquiries into clear next steps.

1. BUSINESS CONTEXT

Business or team _____ Main offer _____

2. WHERE DO NEW INQUIRIES ENTER?

- | | | |
|--|---|---|
| ☐ Website form | ☐ Phone or voicemail | ☐ Ads |
| ☐ Social messages | ☐ Referral | ☐ Walk-in or other |

3. MINIMUM LEAD RECORD

Name and contact _____
Requested service _____
Location _____
Lead source _____
Timing or urgency _____

4. OWNERSHIP AND RESPONSE

First owner _____
Response target _____
Backup owner _____
Where status lives _____
Next-action rule _____

5. YOUR PRACTICAL PIPELINE

Write the real stages your team uses. Every active lead needs an owner and next action.

STAGE 1

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STAGE 2

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STAGE 3

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STAGE 4

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STAGE 5

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STAGE 6

6. WHERE CAN A SYSTEM HELP?

- ☐ Acknowledge receipt
- ☐ Notify the right person
- ☐ Create a task
- ☐ Set a reminder
- ☐ Update a report

7. ONE IMPROVEMENT TO MAKE FIRST

What is the smallest change that would prevent the most important missed handoff?

