LEAD FOLLOW-UP / PLANNING WORKSHEET

Map one enquiry journey

Start with a real business process. Use hypothetical details first; keep private customer information out of shared drafts.

Business and journey

Which service or enquiry type is this plan for? Who owns this worksheet?

Sources and destination

Where does the enquiry start? Where should its record arrive? Include the intended system, not passwords.

Information needed to respond

Which details are necessary? What can wait until a later conversation?

Owner and backup

Who takes responsibility? Who covers absence or a missed notification?

Stages and next action

Define what new, contacted, quote sent, booked, won or closed mean for this journey.

LEAD FOLLOW-UP / PLANNING WORKSHEET

Define the follow-up rules

Agree the message, timing and exceptions before enabling customer communication. A saved workflow is not delivery evidence.

Acknowledgement and sender

What will the message say? Which sender and channel will the customer recognise?

Timing and availability

Record the timezone, allowed sending window and handover outside staffed hours.

Reply, booking and opt-out rules

What stops follow-up? What happens when a reply arrives through another channel or workflow?

Duplicate and missing-detail rules

What if the same person enquires twice, a field is missing or an integration is unavailable?

Exception owner and access

Who sees failures and takes over? Record responsibilities; never enter credentials here.

LEAD FOLLOW-UP / PLANNING WORKSHEET

Check the outcome and hand over

Use an authorised internal test when needed. Exclude test records from enquiry, booking and sales totals.

Controlled test plan

List the normal enquiry, reply, duplicate, booking/cancellation, opt-out and failed-notification paths relevant to this scope.

Evidence and limitations

Record test references and observed receipt or platform results. Mark anything not tested as unverified.

Business outcome definitions

Keep enquiries, confirmed appointments and paid work separate. State the reporting source and known gaps.

Handover and review

Who approves the setup, maintains it and reviews exceptions? Where is the rollback or manual fallback?

This planning template does not connect to a CRM or send messages. Scope, platform capabilities and permissions need separate verification.