Plan the enquiries you want

Start with one service. Download and save this PDF in a PDF reader, then complete the fields or print it. Use "to discuss" where you need advice. This file does not submit answers to No Brainer.

1. Business and service to grow

Business name, website (if any), and the specific service this plan concerns.

2. Business goal

What useful work should marketing help generate? Describe the business need, not a promised number of leads.

3. Suitable work and exclusions

Which jobs fit? Which services do you not provide? What needs a conversation before the team can decide?

4. Real service coverage

Where or how can you actually serve customers? Do not add places just to attract more searches.

5. Timing and capacity

What timing limits, staff availability or site requirements need confirming before work can be offered?

6. Customer next step

Should the visitor call, request a quote or ask about a consultation? Name the page and destination to check.

Agree what happens next

Use summaries of the enquiry process. Do not enter customer records, passwords, payment details or sensitive health or financial information. Keep those in the business's approved systems.

7. Review owner and fallback

Who receives and reviews requests? What happens if they are unavailable, or the service is unclear?

8. Stages and evidence

Define received, suitable, contacted, quoted and accepted for your process. A button click is not a connected call, and a request is not a confirmed job.

9. Scope, costs and responsibilities

What needs scoping: channel, page, content, creative, follow-up? Separate management fees, ad spend, software and website costs. Write "to discuss" if undecided.

10. Controlled verification plan

Before testing, agree permission, dummy test details, expected recipient and receipt evidence. Record the page and device, and exclude tests from genuine enquiries. Do not submit a live test just to fill this sheet.

11. Review point and open questions

When will you review actual requests and suitable conversations? Which unknowns should the agency help resolve?

Bring this saved worksheet to a project discussion if useful. You can use it with any provider. To talk with our Auckland team, call **022 125 2166** or visit **nobrainer.co.nz/contact-us/**. Sending the file is optional.