From Inquiry to Customer: A Lead Follow-Up Guide

Practical response templates, ownership rules and a simple pipeline for business inquiries.



WHERE YOUR BUSINESS COMES TO LIFE!

01 / LEAD FOLLOW UP GUIDE

Define a useful inquiry

01 Customer fit

Which business needs, locations and project types can you serve?

02 Information needed

List the details needed to recommend a next step.

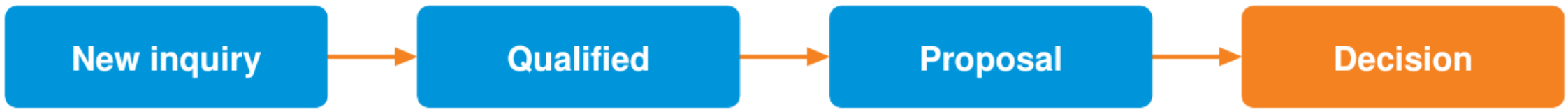
03 Owner and handoff

Name the first responder and who takes over if the inquiry fits.

Type your answers in the fields, then save a copy. You can also print this worksheet.

02 / LEAD FOLLOW UP GUIDE

A simple inquiry pipeline



Log the source and request.

Confirm need, fit and timing.

Present the agreed scope.

Record the outcome and reason.

Use separate statuses for waiting on information and inquiries that are not a fit.

03 / LEAD FOLLOW UP GUIDE

Three adaptable response templates

Initial reply	Thank you for contacting [business]. We can help you explore [service]. What are you hoping to achieve, and when would you like to begin?
Helpful follow-up	Hi [name], I am following up on your request about [service]. Is the project still a priority? I can clarify the scope or help arrange the next conversation.
Close the loop	Hi [name], I will pause follow-up for now. If the project becomes a priority again, reply here and we can review the next step. Thank you for considering [business].

An illustrative follow-up schedule

When	Purpose	What to record
When the inquiry arrives	Acknowledge and ask useful questions	Source, request and owner
After an agreed interval	Provide relevant information	Reply, question or next step
On the promised date	Complete the agreed follow-up	Meeting, proposal or decision
When there is no response	Close the loop respectfully	Status and any future permission

Adapt timing to the inquiry and the customer's preferences. Avoid repeated unwanted messages.

05 / LEAD FOLLOW UP GUIDE

Make inquiry ownership visible

Assign a person

Every active inquiry needs an owner, a current status and a next action with a date.

Keep useful notes

Record the need and agreed next step. Avoid collecting information that is not needed for the project.

Confirm handoffs

Make sure the next person has the context and knows they are responsible for the response.

06 / LEAD FOLLOW UP GUIDE

A weekly inquiry review

01 Waiting inquiries

Which inquiries need a reply, a meeting or missing information?

02 Delayed decisions

Which proposals need clarification or a scheduled follow-up?

03 Learning and improvement

What recurring question or barrier should the team address?

Type your answers in the fields, then save a copy. You can also print this worksheet.

YOUR NEXT STEP

Let us help with your next step

Need help connecting forms, CRM records and follow-up? Required Marketing Group can help map the process and identify suitable automation opportunities.



Request a consultation

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