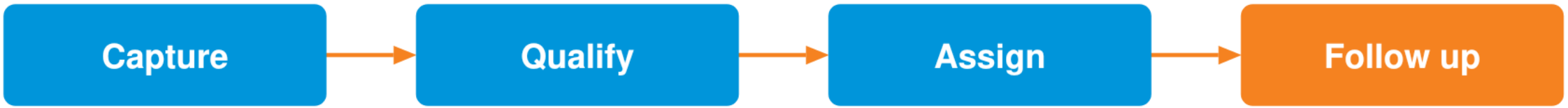
Lead Follow-up & Automation Blueprint

A practical way to connect inquiries,
team ownership and the next conversation.

WHERE YOUR BUSINESS COMES TO LIFE!

01 / THE BASIC WORKFLOW

Every inquiry needs an owner



Record the inquiry

Understand the request

Choose the right team member

Define the next action

A shared process helps the team see what happens next.

02 / CRM ESSENTIALS

A useful inquiry record

Information	Why it helps	Keep it practical
Contact and company	Allows the team to respond	Ask only for what you need
Requested service	Helps route the inquiry	Use understandable choices
Owner and status	Shows who handles the next step	Keep the record current
Next action	Supports follow-through	Record the task and due date

03 / HELPFUL STARTING POINTS

Automation should support the team

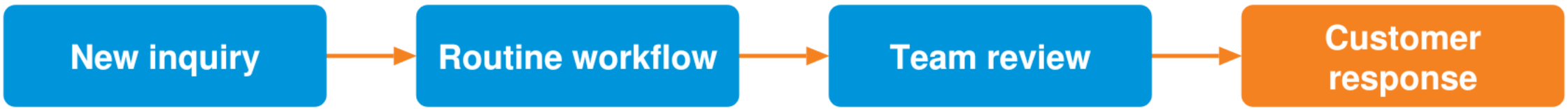


Suitable routine tasks

Acknowledging receipt
Routing inquiry details
Creating a follow-up reminder

Human decisions

Understanding unusual requests
Agreeing scope and pricing
Resolving sensitive issues



04 / RESPONSIBLE IMPLEMENTATION

AI assistants need clear boundaries

Approved information

Provide accurate service details and a clear scope for answers.

Human handoff

Route uncertain or sensitive requests to a person.

Appropriate data use

Review access, permissions and the information each workflow needs.

05 / PILOT AND REVIEW

A small pilot is easier to evaluate

Test	Use sample inquiries to check routing, messages and failure cases.
Review	Confirm the assigned owner receives and understands the task.
Refine	Adjust the workflow before adding more channels or automations.

YOUR NEXT STEP

A follow-up process your team can use

Required Marketing Group can help with AI strategy,
voice and chat assistants, CRM integrations and automation.
Start with one inquiry process to assess.



Request a consultation

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