

The speed-to-lead follow-up playbook

How a small team answers every enquiry fast, follows up without being a nuisance, and stops losing deals it already paid to attract. Targets, scripts, a 14-day cadence and a weekly routine you can start on Monday.

How to use this

1. **Set your own targets first.** Page 3 has blank response-time targets. Pick numbers your team can actually hit, then improve them.
2. **Give every enquiry one owner.** Most slow responses are not laziness. They are an enquiry nobody was sure was theirs.
3. **Copy the scripts, then make them yours.** The first-call script and first email are starting points written to be edited.
4. **Run the weekly routine for a month.** The scorecard at the end shows whether it is working.

Minute 0

Enquiry arrives

First hour

One owner responds

Days 1 to 3

Book the conversation

Days 4 to 14

Follow up, then stop

Every week

Clean the pipeline

The playbook works with any CRM, or a spreadsheet. Where it helps, a short note says how GuardenerAI handles that step, so you know exactly what the product does and what your team does.

An enquiry is the most expensive thing a small business gets. Somebody paid for the ad, wrote the article, earned the referral or built the reputation that made a stranger reach out. That stranger is also, at that moment, comparing you with whoever answers next.

What a fast reply does

- Reaches the person while the problem is still on their mind
- Shows them how you will treat them as a customer
- Gets you into the conversation before they have chosen someone else
- Makes the next step, a call or a meeting, easy to say yes to

What a slow reply costs

- The person has moved on, or found an answer elsewhere
- Your first message has to re-explain why they got in touch
- The enquiry quietly turns into a "maybe later" nobody chases
- The marketing that produced it looks like it does not work

Speed is a process, not effort

Teams rarely answer slowly because nobody cares. They answer slowly because enquiries arrive in several inboxes, nobody is sure whose they are, and the first reply has to be written from scratch. Fix those three things and speed follows: one place enquiries land, one owner for each, and a first reply that is already written.

WHERE ENQUIRIES ARRIVE TODAY	WHO SEES THEM	WHERE THEY SHOULD GO
Website form		
Shared inbox		
Phone and voicemail		
Social messages and WhatsApp		
Referrals and introductions		

Write down a response target for each channel, in hours or minutes, that your team can hit on a normal week. A target you miss every day is worse than a modest one you keep. Review it after a month and tighten it.

CHANNEL	OUR TARGET FOR FIRST RESPONSE	OWNER WHEN IT ARRIVES	BACKUP OWNER
Website form			
Email			
Phone or voicemail			
WhatsApp or SMS			
Referral			

Three ways to route, from simplest

- **One owner for everything.** Right for a team of one to three. The owner has a named backup for holidays and busy days.
- **A shared queue someone claims.** Enquiries wait in one list; whoever is free claims the next one, and it is theirs from that moment.
- **By territory or service.** Right when different people sell different things. Write the rule down so nobody has to guess.



01

Every new enquiry has a named owner within the hour

Not a team, not "sales": a person. If the owner cannot respond, they hand it to the backup by name.



02

Someone checks the list of new enquiries at set times

For example at the start of the day, after lunch and before close. A habit at fixed times beats checking "when there is a moment".

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Website form submissions arrive as leads with the status New. Each lead has an owner, which can be a person or a queue; anyone on the team can claim a lead from the queue, or release it back. Nothing assigns leads automatically, so the owner or queue is set by your team, and a saved list view of New leads is the list to check at those set times.

The first contact has one job: book a proper conversation. Not to sell, not to send a brochure. Keep it short, use what they told you, and make the next step obvious.

First-call script

- **Open:** "Hi [name], it's [you] from [company]. You got in touch about [their words]. Is now a good moment for two minutes?"
- **Confirm:** "Can I check I understood? You're looking to [problem], ideally by [timing]?"
- **One question:** "What made you look into this now?"
- **Next step:** "The best next step is a 30-minute call where I show you [relevant thing]. Does [day] or [day] work better?"
- **If voicemail:** name, company, their topic, one line of value, "I'll send you an email with a link to pick a time".

First email template

- **Subject:** Your enquiry about [their topic]
- Hi [name], thanks for getting in touch about [their words].
- From what you've said, [one sentence showing you read it].
- The quickest way to see whether we can help is a 30-minute call. You can pick a time that suits you here: [booking link].
- If you'd rather, just reply with a couple of times and I'll fit around you.
- [Your name, role, direct phone number]

What makes these work

- **Their words, not yours.** Repeat the phrase they used in the enquiry. It proves a person read it.
- **One clear next step.** A booking link or two suggested times, never "let me know if you have questions".
- **A real name and number.** People reply to people, not to a no-reply address.

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Send the first email from the lead's record through your own connected mailbox, using a saved email template. Share a booking link so the prospect picks a time from your real availability; booking links need a connected mailbox to send the confirmation, and a booking is linked to the lead when the email address matches it exactly.

Most enquiries that go quiet were not a "no". They were busy. A planned cadence across a few channels gives each person several easy chances to reply, and gives your team a clear point to stop. Only use SMS or WhatsApp where the person has agreed to hear from you that way.

DAY	TOUCH	WHAT TO SAY
Day 0	Call, then email	The first call and first email from Part 3, within your target.
Day 1	SMS or WhatsApp	One line: "Sent you a link to pick a time for [topic]. Happy to call instead if easier." Only with consent.
Day 3	Call	A second try at a different time of day. Voicemail points to the email.
Day 5	Email	Something useful: a short answer to their question, an example, or a guide. Booking link again.
Day 8	Call	Short and friendly. Ask whether the timing has changed.
Day 11	Email	"Is this still something you're looking at?" with three reply options: yes now, later, no thanks.
Day 14	Closing email	"I'll stop chasing so I'm not filling your inbox. If things change, reply here and it comes straight to me."

When to stop, and what happens next

- **Stop after the closing email.** Mark the enquiry as lost with a reason, so you can see later why enquiries go cold.
- **Stop at once on a clear no.** Thank them, record the reason, and do not add them to anything else without their agreement.
- **Move "later" to a dated task.** If they say "next quarter", set a task for next quarter rather than keeping them in the cadence.

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Build this cadence once as an action plan: each touch becomes a task with a subject, a priority and a due date set as days after the plan starts. A person applies the plan to the prospect's person or opportunity record, and every follow-up lands in the task list with its date. Tasks do not send reminders on their own, so the owner works from their task list each day.

Speed only pays if the time goes to the right people. In the first proper call, find out whether this is a fit, how soon, and who decides. Write the answers down where the whole team can see them, so nobody asks the same question twice.

ASK	WHY IT MATTERS	THEIR ANSWER
What prompted you to look now?	The trigger tells you urgency and what to lead with.	
What happens if you do nothing?	Separates a real problem from curiosity.	
Who else is involved in the decision?	Avoids a great call with someone who cannot say yes.	
When do you need this working?	Sets the close date honestly.	
What budget have you set aside?	Better asked early than discovered at the proposal.	
What have you tried already?	Shows what not to suggest, and what disappointed them before.	

Qualified: move it forward

- Turn the enquiry into a customer record and an opportunity with a value and close date
- Agree the next meeting before the call ends

Not a fit: close it kindly

- Say so, and point them somewhere better if you can
- Record the reason, so you can see patterns over time

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Move the lead from New to Contacted, then Qualified, Converted or Lost. Converting a lead creates the person, and if you choose, the company and an opportunity at the stage you pick. Notes on the record keep the answers in one place for the whole team.

Thirty minutes once a week keeps the pipeline honest. Run it at the same time each week, with the list of enquiries and open deals in front of you.

- ☐ 01
No enquiry without an owner
Filter new enquiries and assign any that slipped through.
- ☐ 02
No open enquiry without a next step
Every enquiry still in progress has a dated task. If it has none, it is either lost or forgotten.
- ☐ 03
Close what is finished
Mark enquiries past the closing email as lost, with a reason.
- ☐ 04
Check the open deals
Every opportunity has an owner, a value and a close date that is still in the future.

SCORECARD	WEEK 1	WEEK 2	WEEK 3	WEEK 4
New enquiries				
Answered within target				
Conversations booked				
Qualified				
Closed as lost, with a reason				

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Saved list views filtered by status and owner give each person their week at a glance, and a saved report can group leads by status or lead source. Nothing flags a stale lead on its own, which is exactly why the weekly routine matters.

Fast follow-up is a habit your system should make easy.

After four weeks of the routine you will know your real response times, which channels bring the enquiries worth having, and where they go quiet. Use that to tighten one thing at a time.

One place for enquiries

Every form, inbox and referral ends up in the same list, so nothing waits in a place nobody checks.

One owner each

A named person, with a backup, from the moment an enquiry arrives.

A cadence written down

The same touches on the same days, so following up does not depend on memory.

A reason for every loss

Lost reasons show whether the problem is speed, fit, price or timing.

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Leads with owners and queues, action plans for the cadence, booking links, one-to-one email from the record and lost reasons on every deal are all built in. For bulk nurture later, a marketing journey can send to people you add to it, by email, SMS or WhatsApp where they have consented.

Want to set this up on your own enquiries? Start free at guardenerai.com, or book a walkthrough and we will build the cadence with you.