FREETOOLSHELF

CRM and business automation guide

Lead Capture and Follow-Up Tutorial

A step-by-step tutorial for capturing leads from every channel into one place, responding fast, and following up consistently with a copyable multi-channel sequence, stop conditions and measurement.

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Read online: https://freetoolshelf.com/resources/crm/lead-capture-follow-up/

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Information to check before relying on it

- SMS and email consent and opt-out requirements (US TCPA and A2P 10DLC, Canada CASL, Australia Spam Act, UK/EU GDPR and PECR) change; confirm current obligations with a qualified adviser.
- Ad platform lead form integrations and field names change; check each platform's current documentation.
- Messaging channel rules (for example business messaging windows on social platforms) change; check current platform policies.

Most businesses do not have a lead generation problem as much as a lead handling problem. Enquiries arrive through phone calls, web forms, social messages and ad forms, then sit in different inboxes waiting for someone to notice them. By the time a reply goes out, the prospect has often booked with someone else.

This tutorial fixes that in three parts:

1. **Capture**: every lead from every channel lands in one system with its source recorded.
2. **Respond**: every lead gets a useful reply within minutes, not hours.
3. **Follow up**: leads that do not book straight away get a consistent, respectful sequence that stops the moment they respond.

You can do this in any CRM that supports forms, automation and messaging. A free lead follow-up sequence template accompanies this guide, with 12 steps, timing, message text and stop conditions ready to adapt.

Part 1: Capture every lead in one place

Step 1: Audit your lead sources

List every place an enquiry can start. Use this table as a worksheet:

Source	Where it lands today	Who sees it	Typical reply time	Captured in CRM?
Main phone line	Desk phone / mobile	Owner		
Website contact form	Shared inbox	Office admin		
Online booking widget	Booking tool	Nobody until the day		
Facebook / Instagram messages	Social inbox	Marketing contractor		
Ad lead forms	Ad platform download	Nobody		
Google Business Profile messages or calls	Phone app	Owner		
Email enquiries	Owner's email	Owner		
Referrals	Text to owner's phone	Owner		

Filling this in honestly usually reveals at least one source nobody monitors reliably.

Step 2: Route each source into the CRM

For each source, choose the simplest reliable connection:

- **Web forms**: use the CRM's own form, or connect your existing form through a native integration or webhook so each submission creates or updates a contact.
- **Booking widgets**: use the CRM's calendar, or sync your booking tool so new bookings create contacts and opportunities.
- **Phone calls**: route calls through a number the CRM can log, so missed and answered calls appear on the contact record. Where that is not possible, have staff log calls with a quick form.
- **Social messages**: connect business pages to a shared inbox if your CRM supports it.
- **Ad lead forms**: connect the ad platform to the CRM through a native integration or a connector, so leads arrive in seconds rather than via a weekly download. Our Meta ads lead generation guide covers form setup.
- **Referrals and walk-ins**: give staff a short internal form or mobile shortcut to add a contact in under 30 seconds.

Step 3: Record the source on every contact

Source data tells you which marketing is working. Capture it automatically where possible:

- Add UTM parameters to every ad, email and social link with the UTM link builder.
- Add hidden fields to web forms for `utm_source`, `utm_medium`, `utm_campaign`, and pass the values into matching CRM fields.
- Use a "Lead source" picklist for manually entered leads.
- Where your phone system supports it, use separate tracking numbers for major channels.

Later, combine source data with spend to calculate cost per acquired customer using the customer acquisition cost calculator.

Step 4: Design forms that convert and qualify

A lead form balances two goals: making it easy to submit and collecting enough to respond usefully.

Recommended fields for a service business:

Field	Required?	Why
First name	Yes	Personalises replies
Mobile number	Yes (or email)	Fastest reply channel

Email	Optional or required	Sends quotes and confirmations
Service needed (dropdown)	Yes	Routes to the right person and sequence
Postcode or suburb	Optional	Confirms service area
Preferred contact method	Optional	Respects preferences
Message	Optional	Context for the first reply
Consent checkbox for marketing messages	As required locally	Records consent separately from the enquiry

Keep the form short. Every extra required field reduces submissions. Qualify further in conversation, not on the form.

A note on consent: consent to be contacted about an enquiry and consent to receive ongoing marketing messages are often treated differently in law. Keep them as separate checkboxes or clearly separate statements, record the wording shown and the date, and confirm requirements for your country with a qualified adviser.

Capture checklist

- [ ] Every lead source listed with current handling
- [ ] Each source connected so it creates or updates a CRM contact automatically
- [ ] UTM parameters on all campaign links
- [ ] Hidden UTM fields on forms mapped to CRM fields
- [ ] Lead source picklist for manual entries
- [ ] Forms limited to essential fields
- [ ] Marketing consent captured separately, with wording and date recorded
- [ ] Duplicate handling tested (same person submitting twice updates one contact)
- [ ] Staff have a 30-second way to add referral and walk-in leads

Part 2: Respond within minutes

Why speed matters

Many service buyers contact more than one provider and often choose whoever responds first with something useful. We are not going to quote a statistic for how much faster replies improve conversion, because results vary widely by industry and market. You can measure it in your own business: record response time and outcome for each lead for a month, then compare conversion for leads answered within 5 minutes against leads answered after an hour.

Step 5: Set up an instant acknowledgement

Every new form or chat lead should receive an automatic reply within one minute. The reply should be useful, not just "we got your message".

Instant SMS (form lead):

> Hi {first_name}, thanks for contacting {business_name} about {service}. {staff_name} will call you shortly from this number. If it's easier, pick a time here: {booking_link}. Reply STOP to opt out.

Instant email (form lead):

> Subject: Your {service} enquiry with {business_name}
>
> Hi {first_name},
>
> Thanks for getting in touch about {service}. Here is what happens next:
>
> Business hours: {business_hours}
>
> {staff_name}
> {business_name} | {phone}

Step 6: Set up missed call text-back

If a call goes unanswered, send a text within a minute:

> Hi, this is {business_name}. Sorry we missed your call. How can we help? You can reply here or book a time: {booking_link}

Check that texting callers who have not given prior consent is permitted where you operate. In some jurisdictions a single reply to someone who contacted you is treated differently from marketing, but rules vary, so confirm with an adviser.

Use the missed call revenue calculator to estimate what unanswered calls might be costing you today.

Step 7: Create a human task immediately

Automation acknowledges; people close. When a lead arrives, the CRM should create a task for the assigned person with a due time (for example, "Call within 5 minutes"). If the task is not completed in 15 minutes, notify a backup person.

Step 8: Use a first-call script

A consistent first call improves booking rates and data quality. Adapt this outline:

1. **Open**: "Hi {first_name}, it's {your_name} from {business_name}. You asked about {service} a few minutes ago. Is now a good time for two minutes?"

2. **Understand**: "Can you tell me a bit about what's going on?" Listen. Ask one or two follow-up questions.
3. **Qualify**: confirm location is in your service area, rough timing, and who makes the decision.
4. **Recommend the next step**: "The best next step is a {visit/consult/quote call}. I have {option 1} or {option 2}. Which suits you?"
5. **Confirm**: repeat the booking time, address and what to prepare. Tell them they will get a confirmation text.
6. **Log**: update the stage, record notes, and set the next step before hanging up.

If they are not ready: "No problem. Would it help if I sent you some information and checked in on {day}?" Then let the follow-up sequence run.

Part 3: Follow up consistently

Step 9: Decide the sequence rules

Before writing messages, decide:

- **Entry**: which leads enter? (For example, new leads with no booking 15 minutes after arrival.)
- **Length**: how long does it run? For most service businesses, 14 to 21 days of active follow-up, then a lower-frequency nurture list.
- **Channels**: a mix of phone call tasks, SMS and email. Social messages only if the lead started there and platform rules allow.
- **Stop conditions**: reply, booking, opt-out, stage change to won or lost, or manual removal.
- **Quiet hours**: no texts or calls outside reasonable hours in the lead's time zone. Confirm legal limits locally.

Step 10: Copy and adapt the 14-day sequence

This sequence matches the free lead follow-up sequence template. Adjust timing and wording to your business.

Step	Day	Channel	Timing	Goal
1	0	SMS	Within 1 minute	Acknowledge and offer booking link
2	0	Email	Within 5 minutes	Set expectations and request details
3	0	Call task	Within 5 minutes	Speak to the lead and book
4	0	SMS	2 hours after step 3 if no answer	Tell them you tried to call

5	1	Call task	Morning	Second call attempt
6	1	Email	Afternoon	Answer common questions
7	2	SMS	Mid-morning	Short check-in with a question
8	4	Email	Morning	Social proof or process explanation
9	5	Call task	Afternoon	Third call attempt
10	7	SMS	Mid-morning	Offer specific available times
11	10	Email	Morning	Helpful resource related to their need
12	14	SMS	Mid-morning	Polite close-the-loop message

After step 12, move non-responders to a nurture list with a monthly or seasonal email, and mark the opportunity as lost with the reason "No response" so your pipeline stays accurate.

The message templates

Step 4, SMS after missed call attempt:

> Hi {first_name}, {staff_name} from {business_name} here. I just tried calling about your {service} enquiry. When's a good time to chat? Or book here: {booking_link}

Step 6, email with common questions:

> Subject: Quick answers about {service}
>
> Hi {first_name},
>
> People often ask us a few things before booking {service}, so here are quick answers:
>
> If you have another question, just reply to this email. You can also book a time here: {booking_link}
>
> {staff_name}

Step 7, SMS check-in:

> Hi {first_name}, just checking in. Are you still looking for help with {service}? A quick yes or no is perfect.

The yes/no question lowers effort. Any reply stops the sequence and alerts a person.

Step 10, SMS with specific times:

> Hi {first_name}, we have openings on {slot_1} and {slot_2} for {service}. Want me to hold one for you?

Step 12, close-the-loop SMS:

> Hi {first_name}, I haven't heard back so I'll close off your {service} enquiry for now. If you'd like

help later, just reply here or call {phone}. Thanks!

Close-the-loop messages often get replies, because they are clear and low pressure. Still, do not use false urgency or pretend a file is being "deleted".

Step 11: Build the stop logic

The single most important part of a sequence is that it stops at the right moment. Configure:

Event	Action
Lead replies on any channel	Stop sequence; notify owner; create reply task
Lead books an appointment	Stop sequence; move to Booked stage; start appointment reminders
Lead replies STOP or unsubscribes	Stop all marketing on that channel; update consent field
Opportunity marked won or lost	Stop sequence
Owner manually removes lead	Stop sequence
Lead re-submits a form while in sequence	Do not restart; notify owner

Test each one with a test contact before going live.

Want this to run automatically?

A CRM with built-in automation, such as GoHighLevel, can capture leads, send follow-ups and reminders, and track your pipeline in one place. Everything in this guide can also be done manually or with other tools. Some links on our site are affiliate links.

Read our GoHighLevel overview

Step 12: Handle replies well

A sequence exists to start conversations. When a lead replies, the quality of the human response matters more than anything the automation sent. Common replies and suggested responses:

Lead reply	Suggested response	CRM action
"Yes, still interested"	"Great. I have {slot_1} or {slot_2}. Which suits?"	Move to Contacted; create booking task
"How much does it cost?"	Give a range if you publish one, or explain how quotes work and offer the visit	Log question; keep in Contacted
"Not right now"	"No problem. When would be a better time to check in?"	Mark Lost, reason Timing; create reminder task for their month
"Already sorted"	"Thanks for letting us know. Good luck with it."	Mark Lost, reason Chose a competitor or Solved

"Who is this?"	Introduce yourself, the business and the enquiry they made	Check source data is correct
Angry or confused reply	Apologise, explain briefly, offer to stop messages	Review consent; opt out if requested
"STOP" or unsubscribe	No reply beyond any automatic confirmation required	Opt-out recorded automatically

Aim to answer replies within the same speed target as new leads. A reply to a follow-up text is often the moment a lead is most ready to book.

Step 13: Qualify with a light scoring approach

Not every lead deserves the same effort. A simple points system helps staff prioritise calls when time is short. Keep it transparent and adjust it from your own results.

Signal	Points
Service is one of your core, profitable services	+3
Location inside your main service area	+2
Wants the work within 30 days	+2
Came from a referral or repeat customer	+2
Provided photos or detailed description	+1
Outside service area	-5
Service not offered	-5

Illustrative example: a referral lead (+2) for a core service (+3), inside your area (+2), wanting the work next week (+2), with no photos, scores 2 + 3 + 2 + 2 = 9. A lead for a non-core service (0) inside your area (+2) with no timeframe scores 2. On a busy morning, call the 9 first. Scoring should decide order, not whether someone gets a reply. Every lead still receives the acknowledgement and sequence.

Step 14: Nurture leads after the active sequence

Leads who did not respond within 14 days are not necessarily lost for good. Circumstances change. If they gave marketing consent, add them to a low-frequency nurture list:

- **Monthly or seasonal email** with genuinely useful content (maintenance tips, seasonal checklists, how to choose a provider).
- **Service reminders** tied to seasons (for example, heating checks before winter).
- **Re-engagement message** after three to six months: "Hi {first_name}, you asked us about {service} earlier this year. If it's still on your list, we'd be happy to help."

Keep nurture frequency low and always include an unsubscribe option. Remove contacts who never open or click after a reasonable period, which also protects your email sender reputation.

Worked example: the value of follow-up

Illustrative figures only. Use the lead conversion calculator with your own numbers.

A landscaping business receives 80 leads a month. Currently it replies to each once and books 25% of them, so 20 appointments. It closes 50% of appointments at an average job value of $2,400.

- Current: 80 × 0.25 = 20 appointments; 20 × 0.5 = 10 jobs; 10 × $2,400 = $24,000

Suppose a structured follow-up sequence lifts the booking rate from 25% to 32%, with the same close rate and job value.

- New: 80 × 0.32 = 25.6 appointments; 25.6 × 0.5 = 12.8 jobs; 12.8 × $2,400 = $30,720
- Difference: $30,720 minus $24,000 = $6,720 per month

Whether your lift is larger, smaller or zero, measuring it this way tells you whether the effort is worthwhile.

Compliance and respectful messaging

Automated follow-up is only sustainable if it stays within the rules and within what people find reasonable.

- **Consent**: requirements differ by country and channel. In the US, texting is governed by the TCPA and related rules, and business texting from standard local numbers requires carrier A2P 10DLC registration. Canada has CASL. Australia has the Spam Act. The UK and EU apply GDPR and PECR. Confirm your obligations with a qualified adviser. This is not legal advice.
- **Identification**: say who you are in every message.
- **Opt-out**: include a clear opt-out in marketing texts (for example "Reply STOP to opt out") and an unsubscribe link in marketing emails, and honour them promptly.
- **Frequency**: more messages is not always better. Watch opt-out and complaint rates. If more than a small share of people opt out of a sequence, reduce its frequency or improve relevance.
- **Honesty**: no fake scarcity, no misleading subject lines, no pretending an automated message was written personally when it was not.

Measuring your follow-up

Track these weekly:

Metric	How to calculate	What it tells you
Median time to first response	Middle value of (first reply time minus lead arrival time)	Whether your speed-to-lead goal is met
Contact rate	Leads spoken to / total leads	Whether calls and texts reach people
Booking rate	Leads booked / total leads	Overall effectiveness
Reply rate by step	Replies after each step / leads who received it	Which messages work
Opt-out rate by step	Opt-outs after each step / leads who received it	Which messages annoy
Leads with recorded outcome	Leads won or lost / leads older than 30 days	Pipeline hygiene

Use the median rather than the average for response time, because a few leads that arrive overnight can distort the average.

Example: five leads with response times of 2, 3, 4, 6 and 240 minutes. The average is (2 + 3 + 4 + 6 + 240) / 5 = 255 / 5 = 51 minutes. The median is 4 minutes. The median better describes your typical performance; the 240-minute lead is worth investigating separately.

Common mistakes

1. **Only acknowledging, never calling.** An automated text is not a substitute for a conversation.
2. **Sequences without stop conditions.** Texting someone "still interested?" after they booked damages trust.
3. **Same message on every channel.** Vary content; each step should add something.
4. **Too long without a close.** Leads left open for months inflate your pipeline and hide real performance.
5. **Ignoring quiet hours.** Late-night texts generate complaints and opt-outs.
6. **Not recording lost reasons.** You lose the insight into why people did not buy.
7. **Assuming consent.** Buying lists or reusing old contact lists without clear consent creates legal risk.
8. **Never reviewing the messages.** Read replies and opt-outs monthly and improve the wording.

Setup checklist

- ☐ Instant SMS and email acknowledgement live for form and chat leads
- ☐ Missed call text-back live (where permitted)
- ☐ Immediate call task with escalation to a backup after 15 minutes
- ☐ First-call script shared with everyone who answers leads
- ☐ 14-day follow-up sequence built from the template
- ☐ Every stop condition tested with a test contact
- ☐ Quiet hours configured
- ☐ Opt-out wording in every marketing text and unsubscribe link in every marketing email
- ☐ Non-responders moved to nurture and marked lost with a reason
- ☐ Weekly metrics report set up

Next steps

- Download the lead follow-up sequence template and adapt the wording to your voice.
- Once leads book, move them into a well-defined pipeline using the sales pipeline setup guide.
- Protect booked appointments with the appointment automation guide.
- Consider after-hours coverage with the AI receptionist and automation resources.
- Improve the ads that generate your leads with the Meta ads lead generation guide and the Google Ads beginner's guide.
- Measure the impact with the lead conversion calculator.

Keep learning

Find the online version of this guide, related free tools and more guides at https://freetoolshelf.com/resources/.

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