Speed-to-Lead Readiness Checklist

Assessment (5 minutes)

KAJ Analytics | West Houston (Katy, Sugar Land, Cypress and surrounding areas)

Use this checklist to spot leaks in your lead response process. Check what is true today. Your goal: first response in under 5 minutes, 24/7.

1) Capture (no lead left behind)

- ☐ Website form(s) go to a single intake endpoint (not multiple inboxes)
- ☐ Calls and missed calls are captured (tracking number or call routing)
- ☐ Facebook/Google leads route into the same intake stream
- ☐ Spam control exists (honeypot/recaptcha/rules)
- ☐ Every lead gets a unique lead ID

2) Instant response (under 5 minutes)

- ☐ Auto-confirm SMS and/or email sends immediately
- ☐ Message includes one simple next step (reply YES / choose time / booking link)
- ☐ After-hours message sets expectations (when you will call)
- ☐ Opt-out language exists (STOP) and you honor quiet hours

3) Qualification (reduce junk + speed scheduling)

- ☐ You have 3–6 qualifying questions per service type (e.g., HVAC vs fence)
- ☐ Photo capture is requested when helpful (repairs, gates, access issues)
- ☐ Urgency question exists (today/this week/this month)
- ☐ Lead is tagged by service + city/zip + urgency

4) Routing (right person, right now)

- ☐ Rules exist for who gets notified (by service/zip/day/time)
- ☐ Backup routing exists (if no response in 2 minutes, escalate)
- ☐ Manager/owner is alerted on high-value leads
- ☐ Missed-call text-back is enabled

5) Scheduling (frictionless next step)

- ☐ Booking link OR 'two time options' workflow exists
- ☐ Calendar sync exists (or dispatcher queue exists)
- ☐ Appointment confirmation and reminders are automated
- ☐ No-show reducer exists (reminder + confirm/cancel)

6) CRM + follow-up (where deals are won)

- ☐ Lead is created in your CRM automatically (Jobber if it is your hub)
- ☐ Status stages exist (New → Contacted → Qualified → Scheduled → Won/Lost)
- ☐ Follow-up sequence exists for non-responders (Day 0/1/3/7)
- ☐ Quote follow-up sequence exists (24h / 72h / 7d)

7) Measurement (prove ROI)

- ☐ Response time is tracked (lead received → first human reply)
- ☐ Missed call rate is tracked
- ☐ Booking rate is tracked (lead → scheduled)
- ☐ Close rate is tracked (scheduled → won)
- ☐ Weekly report is generated automatically

Scoring

0–14 Not ready (leaks everywhere)
15–23 Partially ready (you'll see gains fast)
24–28 Ready (optimize and scale)