

Lead Response Checklist

The 3-attempt contact cadence — use for every new inbound lead

IMMEDIATE RESPONSE (FIRST 5 MINUTES)

- Call the lead within 5 minutes of opt-in**
Leads contacted in 5 minutes convert at 21x the rate of 30-minute responses. No exceptions. **CRITICAL**
- If no answer — send a personalized text within 2 minutes**
Reference what they inquired about. "Hi [Name], I saw your inquiry about [topic]..." Not a generic auto-text. **CRITICAL**
- Review GHL record before calling — know their source and inquiry**
What did they ask about? What source did they come from? Tailor your opening accordingly. **HIGH**
- For ISA-routed leads — read ISA notes before calling**
The ISA already qualified them. Use their notes. Never make the lead repeat themselves. **CRITICAL**

ATTEMPT 2 — WITHIN 1 HOUR

- Second call attempt — different time of day if possible**
If morning failed, try afternoon. Do not leave a second voicemail — just call. **HIGH**
- If still no answer — leave one voicemail only**
Brief: name, saw their inquiry, your number, will try tomorrow. Under 25 seconds. **STANDARD**
- Log attempt in GHL — tag as "Attempted Contact"**
Move lead from New Lead stage to Attempted Contact. Set Day 2 task. **CRITICAL**

ATTEMPT 3 — DAY 2

- Send a value-add text on Day 2 — not a follow-up**
"I put together a quick search based on what you were looking for — happy to send it over." **HIGH**
- Call attempt 3 on Day 2 — morning or evening**
Third and final manual attempt before moving to automated nurture. **HIGH**

**If no contact after 3 attempts — move to long-term nurture**

Add to 12-month GHL sequence. Set a manual 30-day check-in task as a reminder.

CRITICAL**AFTER CONTACT IS MADE****Qualify timeline, motivation, budget, and representation status**

These four questions determine every next step. Log answers in GHL notes immediately.

CRITICAL**Identify hot, warm, or long-term — assign to correct nurture sequence**

Hot (0-60 days): active sequence. Warm (60-90 days): weekly. Long-term (90+): monthly.

CRITICAL**Book the next step before hanging up — consultation, showing, or CMA**

"Do you have time [day] or [day] this week?" Always offer two specific options.

CRITICAL**Update GHL record with full conversation notes within 10 minutes**

Date, what was discussed, timeline, motivation, next step. Future you depends on this.

CRITICAL**Notes**