

SEVEN CHECKS BEFORE YOU SWITCH IT ON

Before You Automate HVAC Lead Follow-Up

Pick one lead path. Set the rules. Give every next action an owner.

Business

Review date

Lead path

1 Lead record

☐ Ready

Where does the inquiry live, and who checks possible duplicates?

OUR RULE / NEXT ACTION

Owner

Test evidence

2 Ownership

☐ Ready

Who acts next, and who covers them when they are unavailable?

OUR RULE / NEXT ACTION

Owner

Test evidence

3 Routing

☐ Ready

Where does each request go, including unclear or urgent requests?

OUR RULE / NEXT ACTION

Owner

Test evidence

4 Timing

☐ Ready

What happens after hours, after a delay, or when a message fails?

OUR RULE / NEXT ACTION

Owner

Test evidence

FINISH THE RULES. THEN TEST THE WHOLE PATH.

What happens next?

Mark a check ready only after you can explain the rule and show it works.

5 Stop conditions

☐ Ready

What changes when someone replies, books, declines, or asks to stop?

OUR RULE / NEXT ACTION

Owner

Test evidence

6 Human handoff

☐ Ready

What information reaches the person taking over the conversation?

OUR RULE / NEXT ACTION

Owner

Test evidence

7 Appointment

☐ Ready

Which system confirms the booking and handles changes or cancellations?

OUR RULE / NEXT ACTION

Owner

Test evidence

Run these test inquiries

Use contact details you control. Keep test activity out of real lead reporting.

- | | |
|--|---|
| ☐ Website inquiry during office hours | ☐ Booking, then cancellation or reschedule |
| ☐ Missed call after hours | ☐ Unclear request / human review |
| ☐ Duplicate inquiry | ☐ Request to stop follow-up |
| ☐ Reply during automatic follow-up | |

FIRST THING TO FIX

Need help? Book a Lead Conversion Audit

904-892-6867