Max Quality Leads

FREE CHEAT SHEET 03 / 07

THE LEAD FOLLOW-UP & BOOKING SYSTEM

Speed-to-lead rules, GoHighLevel automations, SMS, WhatsApp and email sequences, and a call script that turns enquiries into booked surveys.

INSIDE

- Speed-to-lead rules and form questions that qualify
- A GoHighLevel automation and pipeline map
- A 14-day multi-channel follow-up sequence
- Copy-ready messages, a call script and objection answers

> A lead is not a customer. It's a homeowner who raised a hand for a few seconds, often while scrolling on the sofa. What happens in the next five minutes decides whether you get a booked survey or a ghost. This is the follow-up system we build for clients in GoHighLevel.

01 SPEED-TO-LEAD: THE FIVE RULES

1. **Reply within five minutes**, every time, during working hours. Automate the first touch so it happens in seconds.
2. **Call first, text second.** An instant SMS or WhatsApp says 'we got it'; a call within minutes is what books the visit.
3. **Use their words.** Mention the service, area and answers they gave on the form. It proves a real person read it.
4. **Don't stop at one attempt.** Most leads that go quiet are busy, not uninterested. Follow the sequence below for 14 days.
5. **Book, don't chat.** Every message should move towards one thing: a date and time in the calendar.

02 CAPTURE LEADS THAT ARE WORTH CALLING

Qualify before you call. Two to four questions on your form saves hours of dead-end phone calls.

Questions that filter well

- Do you own the property? (Homeowner / Landlord / Tenant)
- What's the postcode of the property?
- When are you hoping to start? (ASAP / 1-3 months / 3-6 months / Just researching)
- Rough budget? (Use ranges that match your real prices)
- Best way to reach you? (Call / WhatsApp / Email)

Form settings to check

- Use Meta's **higher intent** form type, which adds a review step
- Short intro that repeats the offer from the ad
- Thank-you screen tells them who will call and when
- Send leads straight into GoHighLevel, not a spreadsheet you check at night
- Landing page instead of a form when you want fewer, warmer leads

03 THE GOHIGHLEVEL AUTOMATION MAP

Trigger	Automatic actions	Who does what
New lead arrives	Create contact, tag service + area, add to pipeline 'New lead', instant SMS/WhatsApp + email, notify the team by app push and SMS	Owner or office calls within 5 minutes
Lead replies	Stop the sequence, move to 'Contacted', alert the assigned person	Reply personally, offer two time slots
Appointment booked	Move to 'Survey booked', confirmation SMS + email with calendar invite, reminders 24h and 2h before	Prepare for the visit

Trigger	Automatic actions	Who does what
No-show	Move to 'No-show', send a friendly reschedule message with booking link	Call the same day
Quote sent	Move to 'Quote sent', follow-up messages on day 2, 5 and 10	Call on day 3 to answer questions
Job won	Move to 'Won', thank-you message, review request 2 days after completion, referral ask at day 14	Deliver a great job
Lost / not now	Move to 'Nurture', monthly helpful message and seasonal offers	Nothing until they reply

MQL NOTE

Pipeline stages we use: New lead, Contacted, Survey booked, Survey done, Quote sent, Won, Lost, Nurture. Keep it this simple and actually move the cards.

04 THE 14-DAY FOLLOW-UP SEQUENCE

When	Channel	Message
0 min	SMS / WhatsApp	Instant reply (template A)
0–5 min	Call	First call. No answer? Leave a short voicemail
10 min	Email	Confirmation with who you are and what happens next
1 hour	Call	Second call attempt
Day 1 evening	SMS / WhatsApp	Template B: offer two time slots
Day 2	Call	Different time of day than before
Day 3	Email	Job story or reviews from their area
Day 5	SMS / WhatsApp	Template C: soft check-in
Day 7	Call + SMS	Final call attempt this week
Day 14	SMS / WhatsApp	Template D: break-up message, then move to Nurture

05 MESSAGE TEMPLATES

A · INSTANT REPLY

Hi **[first name]**, it's **[your name]** from **[Business Name]**. Thanks for asking about a **[service]** in **[area]**. I'll give you a quick call in the next few minutes from **[number]**. If now's not good, just reply with a better time.

B · OFFER TWO SLOTS

Hi **[first name]**, I tried to catch you earlier about your **[service]**. I can pop round for the free **[survey]** on **[day]** at **[time]** or **[day]** at **[time]**. Which suits you better?

C · SOFT CHECK-IN

Hi **[first name]**, just checking in. Are you still thinking about the **[service]** this **[season]**? Happy to answer any questions by message if that's easier than a call.

D · BREAK-UP MESSAGE

Hi **[first name]**, I don't want to keep messaging if the timing's not right. Shall I close your enquiry for now, or would you still like a free quote? A simple yes or no is perfect.

This often gets the most replies of the whole sequence. Keep it friendly, never guilt-trip.

EMAIL · CONFIRMATION

Subject: Your **[service]** enquiry, **[first name]**

Hi **[first name]**,

Thanks for getting in touch. I'm **[name]**, **[role]** at **[Business Name]**. Here's what happens next:

1. We have a quick call to understand your project (about 5 minutes)
2. We visit to measure and talk through options, free and without obligation
3. You get a written, fixed quote within **[timeframe]**

You can pick a time for the visit here: **[booking link]**

[Name] | **[phone]** | **[accreditation]**

06 THE BOOKING CALL SCRIPT

OPEN	Hi **[first name]**, it's **[name]** from **[Business Name]**. You asked about a **[service]** a few minutes ago. Is now an OK time for a quick chat?
CONTEXT	Great. You mentioned you're in **[postcode area]** and hoping to start **[timeframe]**. What's prompting the project?
QUALIFY	Roughly what size is the **[room / area]**? Have you had any other quotes yet? Is there anyone else who'd want to be at the visit?
BUDGET	Projects like this usually fall between £**[low]** and £**[high]**. Does that sit about right for you?
BOOK	The best next step is a free visit so we can measure and give you a fixed price. I've got **[day]** at **[time]** or **[day]** at **[time]**. Which works?
CONFIRM	Perfect. You'll get a text confirmation now and a reminder the day before. Anything you'd like us to bring?

COMMON OBJECTIONS, SHORT ANSWERS

They say	You say
"Can you just email me a price?"	I can give you a ballpark now: usually £**[low]**–£**[high]**. A visit lets me give you a fixed price so there are no surprises later.
"I'm just getting ideas."	That's exactly what the visit is for. No pressure to decide; you'll get options and prices to compare.
"I need to speak to my partner."	Of course. Shall we book a time when you're both home so you hear the same thing?
"I've had other quotes."	Good, you should. We'll give you a written, itemised quote so it's easy to compare like for like.

AFTER THE VISIT: NO-SHOW AND QUOTE FOLLOW-UPS

NO-SHOW (SAME DAY)

Hi **[first name]**, we were due to pop round at **[time]** today but didn't manage to catch you. No problem at all, these things happen. Would **[day]** at **[time]** or **[day]** at **[time]** work better?

QUOTE FOLLOW-UP (DAY 2)

Hi **[first name]**, just checking your quote for the **[service]** came through OK. Any questions on the options or the price? Happy to talk it through by phone or here.

QUOTE FOLLOW-UP (DAY 10)

Hi **[first name]**, we're planning our **[month]** installs this week. If you'd like to go ahead with the **[service]**, let me know and I'll hold a slot for you. If you've decided against it, no worries, a quick reply helps us plan.

07 KEEP IT LEGAL AND HUMAN

- Only message people who opted in through your form, and include a simple way to opt out (reply STOP).
- WhatsApp Business: messages you start outside a 24-hour reply window need pre-approved templates, so set these up in advance.
- Send messages at sensible hours (roughly 8am to 8pm) and pause automations on bank holidays if no one can respond.
- Every automation should hand over to a real person the moment the lead replies.

Max Quality Leads

WE SPEAK LESS. WE WORK MORE.

WANT EXCLUSIVE LEADS?

Every lead we generate is exclusive to you and qualified before you call. We can build and run the GoHighLevel follow-up for you too.

EXCLUSIVE

Your leads are yours. Never shared, never resold.

QUALIFIED

Screened before you pick up the phone.

CUSTOM OFFER

Built around your trade, area and margins.

Book a free strategy call

cal.com/utsav-daga/30-minute-strategy-call

Message us on WhatsApp

wa.me/919510371305

HOW WE WORK

- **Free consultation** to map your offer, area and targets.
- **Pay per lead: £3–£4** plus ad spend.
- **Meta ads setup: £400/month.**
- Meta ads, Google ads, GoHighLevel follow-up, WhatsApp/SMS/email and Google Business Profile management.