The 6-Stage Pipeline *Checklist*

Half of most leads go quiet between the click and the call. Walk one enquiry through these six stages and tick what's actually in place. Anything unticked is where leads are being lost.

01 Capture

- [ ] One landing page per offer, built for one decision
- [ ] Form or quiz asks a qualifying question, not just name and email
- [ ] Every submission lands in the CRM, tagged with its source
- [ ] Thank-you page tells them exactly what happens next

02 Qualify

- [ ] Instant reply by email and SMS within 60 seconds
- [ ] Leads scored or tagged so hot ones get fast attention
- [ ] Pipeline stages match how you really sell
- [ ] You or your team are alerted when a hot lead arrives

03 Book

- [ ] Booking link in the first reply, not three emails later
- [ ] Confirmation, reminder and day-of messages all automated
- [ ] No-show flow that offers a second chance automatically
- [ ] Pre-call questions sent so the call starts with context

04 Follow up

- [ ] Nurture sequence written in your voice, loaded and live
- [ ] Re-engagement flow for leads who went quiet after 14 days
- [ ] Post-call and post-proposal follow-ups automated
- [ ] Segments so launches reach the right people only

05 Close

- [ ] Proposal and agreement sent and signed in one flow
- [ ] Payment link or deposit built into the yes
- [ ] Won deal triggers onboarding without anyone remembering
- [ ] Lost deal gets a kind follow-up with a path back

06 Onboard

- [ ] Welcome sequence and intake form go out automatically
- [ ] Portal, membership or folder access created on day one
- [ ] Internal tasks created for your team
- [ ] Review and referral asked for at the right moment, later

Score: 20 to 24 ticks, you're connected. 12 to 19, two stages need work. Under 12, start with Capture and Follow up.

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