



SPEED TO LEAD · SCORED WORKSHEET · NIMBUS EDITION

The first five minutes.

Your marketing is working. The phone rings and the forms come in. This is how you find out what happens next, using your own business as the test.



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EDITION

Nimbus edition
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TIME TO COMPLETE

About 40 minutes
Two live tests

WHAT YOU NEED

A phone nobody knows
An outside email

How to use this.

The tick boxes and the blank lines are live. Fill them in any PDF reader, save the file, and what you wrote stays put. Print it if you would rather.

Run the tests before you read the rest.

Pages three and four are the document. Everything after them exists to tell you what your own answers mean. Start with the form, because it costs five minutes of attention and then an hour of waiting.

Use a phone number and an email address nobody there knows.

A mobile that is not in your records. A personal email address, not one on your own domain. If the person answering works out that it is you, you have measured nothing at all.

Write down clock times, not elapsed times.

Elapsed time is a guess and the guess is always generous. Note the time you submitted and the time each reply landed. The gap between them is the only number this worksheet needs.

Run the phone test twice.

Once inside working hours and once outside them. The second call is the one that separates businesses, because it is the one nobody at yours has ever heard.

Copy what was said, not what it meant.

Word for word, including the pause before the greeting. Summaries flatter everybody. The transcript is the part you will read again in three weeks and wince at.

Score once you have both results.

Page five turns what you wrote into a number out of forty and a verdict. Page six tells you which fix comes first and why that order is the order.

BEFORE YOU START

Do not warn anybody, and do not run it on a quiet Tuesday morning when the office is calm and everyone is at a desk.

Pick an ordinary moment instead. A Thursday at four. A Saturday at ten. You are not trying to catch anyone out, and it is worth saying so afterwards. You are trying to see what the median customer sees, and the median customer does not arrive at a convenient time.

One test is a sample of one. That is still infinitely more than you have now, and it takes less time than reading a monthly report.

The cheapest fix you have.

You paid for the lead before it arrived. Everything that happens after that point is happening to something you already own.



A lead is not a customer. It is a person with a problem who has decided, for the next few minutes, that you might be the answer. That decision is perishable. They are sitting still with a phone in their hand and three other tabs open.

This is also the only part of the chain that costs nothing. The ads cost money. The ranking took months. The photographs cost money. Answering costs attention, and attention is the one input you are not already buying.

Which is what makes a response problem expensive and quiet at the same time. Nothing registers as a loss. The lead arrived, so the ads worked. The form submitted, so the site worked. Next month's report will say the campaign performed.

WHAT THE ADVICE ASSUMES

- A CRM with routing rules
- Reps who are paid on speed
- A lead scoring model
- Somebody whose only job is this

WHAT YOU ACTUALLY HAVE

- A phone on the counter
- Whoever is nearest to it
- One form emailing one inbox
- Two people already on jobs

THE NUMBER YOU HAVE BEEN QUOTED

You have probably been told to answer inside five minutes. That advice traces back to one place: an article called *The Short Life of Online Sales Leads*, published in *Harvard Business Review* in March 2011.

It was written by James Oldroyd, Kristina McElheran and David Elkington. Elkington was chairman and chief executive of InsideSales.com, the software company whose customer data the research used.

That is not a scandal. It is worth knowing, because fifteen years of blog posts have repeated the finding without repeating the date, the sample or the seller. So this worksheet quotes nobody. You are going to produce your own number this afternoon.

The form test.

Submit your own contact form from a device nobody there will know. Then leave it completely alone and write down what arrives.

01 The submission

DATE

TIME YOU SUBMITTED IT

PAGE THE FORM SITS ON

NAME AND EMAIL ADDRESS YOU USED

02 What came back on its own

REPLY ARRIVED AT

WHERE IT LANDED

REPLY-TO ADDRESS

WHAT THE AUTOMATIC REPLY ACTUALLY SAID, WORD FOR WORD

03 The first reply from a person

TIME IT ARRIVED

CHANNEL

GAP SINCE YOU SUBMITTED

WHAT THEY SAID, AND WHETHER THEY ASKED YOU ANYTHING

SECOND ATTEMPT, IF ANY: TIME

SECOND ATTEMPT: CHANNEL

THE FAILURE NOBODY CHECKS

A form has two jobs. Show the visitor a thank you, and send a notification to a human. The first is visible on the page. The second is invisible, and it breaks silently.

It breaks when somebody leaves and their address stays on the form, when a domain moves, or when the office spam filter starts eating mail sent by your own website. Nothing looks wrong. The thank you page still appears. If nothing reached anyone in this test, you do not have a slow response. You have a broken pipe.

The phone test.

Call your own main number from a number nobody has. Then call it again at the worst possible time. Write down what a stranger would have heard.

01 The call during working hours

DATE

TIME YOU CALLED

NUMBER YOU CALLED

RINGS BEFORE ANYTHING

ANSWERED OR VOICEMAIL

WHO PICKED UP

THE GREETING, WORD FOR WORD, INCLUDING THE PAUSE BEFORE IT

DID THEY TAKE A NAME AND A NUMBER?

WHAT THEY PROMISED WOULD HAPPEN NEXT

02 The call outside working hours

DAY AND TIME YOU CALLED

WHAT HAPPENED

TIME OF ANY CALLBACK

WHAT THE VOICEMAIL, MESSAGE OR AUTOMATIC TEXT ACTUALLY SAID

03 The verdict a stranger would reach

IN ONE SENTENCE: WHAT WOULD A FIRST TIME CALLER HAVE DECIDED ABOUT YOU

THE CALL THAT NEVER RANG

Count the calls that ring out. Most businesses cannot.

A missed call leaves no record anywhere except the handset it rang on, and it is worse than a slow email. The caller had already decided to speak to somebody, so when nothing happens they press the next result. There is no nurture sequence for a person who has moved on.

Score yourself.

Tick every line that is true of what you wrote down. The weighting is by consequence, not by effort. The lines worth six points are the ones that lose the customer outright.

- | | |
|--|-------|
| ☐ The form notification reached an actual human being. | 6 pts |
| ☐ A person, not an automatic message, replied within one hour. | 6 pts |
| ☐ The daytime call was answered by a person within five rings. | 6 pts |
| ☐ The out of hours call reached a message or a text, not silence. | 4 pts |
| ☐ Somebody asked for a name and a way to call back. | 3 pts |
| ☐ Something happened after the out of hours call before the next day ended. | 3 pts |
| ☐ An automatic reply arrived within one minute of submitting. | 2 pts |
| ☐ That automatic reply named a person or a time, not just receipt. | 2 pts |
| ☐ It landed in the main inbox rather than promotions or spam. | 2 pts |
| ☐ Whoever answered gave the business name and their own name. | 2 pts |
| ☐ The first reply asked a question instead of only acknowledging. | 2 pts |
| ☐ There was a second attempt when the first one got no response. | 2 pts |

SCORE OUT OF 40



0 to 13 **Leaking**

A real share of what you pay for never becomes a conversation. Start at the top of page seven and buy nothing.

14 to 25 **Patchy**

You catch leads when the timing is kind and lose them when it is not. The fix is a rule, not more effort.

26 to 34 **Solid**

The obvious holes are covered. What is left is out of hours and the second attempt.

35 to 40 **Fast**

Spend nothing more here. Put the money back into producing more of these.

WHAT YOUR NUMBER IS AND IS NOT

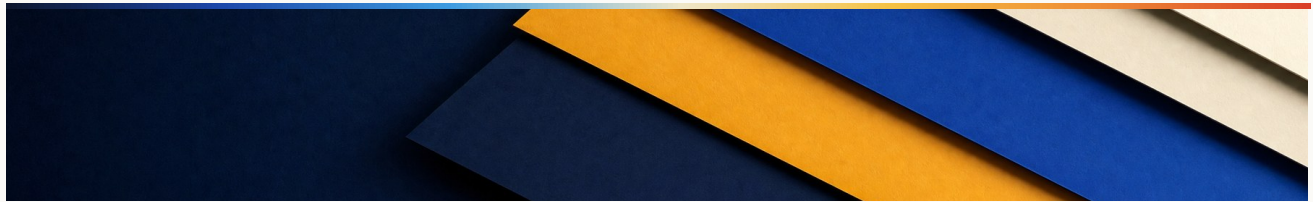
This is one test on one day. It is a sample, not an average.

Run it again in three weeks on a different day and keep the lower score. The bad day is the one your customers describe to their friends.

The number is not the useful part either. The two transcript boxes are. Read them out loud to whoever answers your phone.

What to fix first.

In order. Each one takes less than a day, none of them needs software, and each is worth more than the one below it. Do them one at a time.



1. Send the notification somewhere with two people in it.

One inbox is a single point of failure with a holiday allowance. Use a shared address, add a second recipient, and submit your own form once a month to confirm it still arrives.

2. Answer, or text back, inside a minute.

If nobody can pick up, the phone should send a text on its own: who you are, that you saw the call, and when you will ring. On most business phone systems this is a setting rather than a project.

3. Give the first reply a name and a time.

We received your enquiry is not a reply. This is Dana, I will call you before four is a reply. The same sentence works by email, by text and out loud.

4. Ask one question in that first reply.

A question turns a notification into a conversation and it buys the second message. What is the address beats thanks, we will be in touch.

5. Name the person who answers when the usual person cannot.

Not a rota. One sentence. If Maria is out, Sam answers, and if Sam is on a job it goes to the service. Most lost leads are not a failure of speed. They are a failure of nobody being the person.

6. Retest in three weeks and keep both scores.

Whatever you fix will drift back. The retest is the difference between an interesting afternoon and a number that actually moved.

WHY THIS STAYS BROKEN

Every item above is cheap, quick and needs nobody's approval. That is exactly why none of them get done.

Work with no invoice and no vendor attached also has no date attached. Pick one, put a date on it, and let the retest tell you whether it held.

If you only do one, do the second. A missed call that gets a text back inside a minute recovers somebody who had already decided to buy.

The same test, run by a stranger.

You can do everything in this worksheet yourself, and you should. The one thing you cannot do is be a stranger to your own business. We can.

One call

We ring your main number during working hours from a number nobody there knows. We log the time, the rings, the greeting, and whether anyone asked for a way to reach us.

One page back

Two timelines, what was said and sent word for word, and the three things we would change first. Written, and sent by email.

Nothing to sell

If your response is already fast we will say so and that is the end of it. There is nothing worth selling to a business that answers its phone.

One form

We submit your contact form as an ordinary enquiry. We log what came back on its own, where it landed, what it said, and how long a person took to appear.

One out of hours attempt

The same two contacts again on an evening or a weekend, because that is where most of the gap usually sits and nobody ever checks it.

Or ignore us entirely

Everything we do in the shop is on pages three and four. Run it yourself, keep the score, and never speak to us. It was built to work that way.

BOOK THE MYSTERY SHOP

Send your main number and the address of your contact page. We run it within five working days and send back one page. No call, no deck, no follow-up sequence.

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