



INBOUND LEAD & BOOKING CONVERSION AUDIT

SAMPLE REPORT

Prepared for
Harbor Ridge Home Services
Kansas City Metro

Residential HVAC, plumbing, and indoor-air-quality service

**FRONT-DOOR
SCORE
32/60**

Significant booking leakage likely

Core question: Where are new inbound opportunities being lost before they become properly booked, owned, or handed into the sales process?

Fictional sample. All company details, inquiry records, metrics, and examples are invented for demonstration purposes.

Executive Summary

Harbor Ridge Home Services is generating enough inbound demand to expose weaknesses in the front-end response process. The largest issue is not a lack of inquiries; it is inconsistent ownership when the first phone call is missed, the web inquiry arrives after hours, or the customer does not book immediately.

The reviewed sample shows a meaningful group of recent inquiries that were never clearly disqualified, booked, or assigned a next action. The recommended priority is to establish one response owner per channel, one measurable response-time target, a simple booking fallback when the prospect cannot be reached, and a weekly review of recent unbooked inquiries.

126 INQUIRIES REVIEWED	29 MISSED / UNANSWERED FIRST CONTACT	72 BOOKED
21 AFTER-HOURS INQUIRIES	14 CANCELLATIONS / NO-SHOWS	18 CLEANUP QUEUE CANDIDATES

Front-Door Conversion Scorecard

Category	Score	Assessment
Call Answering & Coverage	5/10	Business-hours answering is generally functional, but missed-call and after-hours ownership are inconsistent.
Speed to Lead / Response	4/10	Response timing is not measured consistently; several missed calls and forms had long or undocumented gaps.
Intake Quality & Qualification	6/10	Core questions are usually asked, but notes and qualification reasons vary by employee.
Booking Conversion Process	6/10	Qualified prospects can be booked, but unbooked inquiries often lack a defined fallback or next action.
Confirmation & No-Show Prevention	5/10	Confirmations are used, but cancellation/no-show recovery is not standardized.
Ownership & Handoff	6/10	Booked appointments move into the system; recent unbooked inquiries are much less visible.

Overall score: 32/60 — inconsistent front-door process with significant booking leakage likely. The score is a process diagnostic, not a forecast of lost sales or revenue.

Inbound Conversion Snapshot

Measure	Count	Interpretation
Total inbound inquiries	126	All channels in the fictional 30-day review
Phone calls	79	Includes answered and missed calls
Web / form / email / text	47	Combined digital inquiry channels
Missed / unanswered first contact	29	Does not mean 29 lost sales; it identifies response-risk events
After-hours inquiries	21	Ownership and response timing were inconsistent
Booked appointments	72	Booked during the reviewed period
Unbooked / unresolved	31	Includes unqualified, unreachable, timing, and unclear outcomes
Cancellations / no-shows	14	Recovery handling varied by staff member

Inbound Response & Booking Journey Map

Stage	Required Control
1. Inquiry Arrives	Phone, web form, text, email or other inbound source
2. First Response	Answer live or acknowledge quickly; assign a clear owner
3. Intake / Qualification	Capture service need, location, timing, contact preference and qualification reason
4. Booking / Next Step	Book appointment or record why it cannot be booked now
5. Confirmation	Send date/time, expectations, reschedule path and reminder
6. Attendance / Recovery	Completed, rescheduled, cancelled or no-show; act on unresolved outcome
7. Handoff	Move booked/qualified opportunity into the sales/CRM process with usable notes

Primary break point: stages 2–4. When the first attempt does not produce a booking, the process becomes employee-dependent rather than rule-driven.

PRIORITY FINDINGS

Top 5 Inbound & Booking Leaks

1. Missed calls do not trigger one consistent recovery action

Evidence	In the fictional sample, 29 inquiries were missed/unanswered on first contact; follow-up method and timing varied.
Why it matters	Some prospects receive a callback, some receive a text, and some receive no documented second action.
Recommended correction	Create a single missed-call rule: owner assigned, acknowledgement sent, callback attempt logged, and next action dated.
Priority	Immediate
Implementation effort	Low

2. After-hours inquiries lack clear ownership

Evidence	21 inquiries arrived outside normal business hours; the next-morning owner was not always visible.
Why it matters	After-hours demand can sit until someone notices the inbox/call log.
Recommended correction	Assign one opening-shift owner and one after-hours acknowledgement rule for every inbound channel.
Priority	High
Implementation effort	Low

3. Intake notes are too inconsistent to support clean handoff

Evidence	Service need and scheduling notes were usually present, but qualification reason and customer timing were often incomplete.
Why it matters	Poor notes force the next employee to rediscover information and make unbooked outcomes hard to diagnose.
Recommended correction	Use a six-field intake minimum and require a reason whenever an inquiry is not booked.
Priority	High

Implementation effort

Low

4. “Not booked” is treated as an outcome instead of a status

Evidence

Several recent inquiries had no booking and no definitive lost/disqualified reason.

Why it matters

A qualified inquiry can disappear simply because the first contact or preferred time failed.

Recommended correction

Require every unbooked qualified inquiry to have one next action, future date, or explicit close reason.

Priority

Immediate

Implementation effort

Low

5. Cancellation / no-show recovery is ad hoc

Evidence

14 appointments cancelled or no-showed; follow-up depended on the individual employee.

Why it matters

A booked appointment can still leak before the sales/service conversation occurs.

Recommended correction

Use one same-day reschedule message and one dated follow-up rule for unresolved cancellations/no-shows.

Priority

Medium

Implementation effort

Low

RECENT INQUIRIES TO RESOLVE FIRST

Immediate Cleanup Queue

This queue is not a prediction of close probability. It is a list of recent inquiries that deserve a clear disposition because the fictional records did not show a definitive disqualification, booking, or do-not-contact outcome.

ID	Age	Channel	Last action	Gap	Recommended next step
HR-118	1 day	Missed call	Callback attempted once	No answer	Send missed-call text + second callback
HR-114	2 days	Web form	Auto-email only	No owner	Assign owner; direct booking question

HR-111	3 days	Phone	Answered; wanted later slot	No next date	Offer 2 alternate windows
HR-107	4 days	Text	Asked about service area	No outcome	Confirm fit + booking link/slot
HR-103	5 days	After-hours call	Voicemail	No documented callback	Callback + acknowledgement
HR-099	6 days	Web form	Email response	No reply	Second human follow-up
HR-096	7 days	Phone	Qualified	Preferred time unavailable	Offer alternatives
HR-091	8 days	Phone	Booked then cancelled	No reschedule	Same-day reschedule message
HR-086	9 days	Email	Asked about timing	Open	Answer timing + ask for booking
HR-081	10 days	Missed call	Text sent	No second action	Close-loop attempt

In a real client report, include up to 20 only when supplied data supports responsible re-contact. Definitively lost, unqualified, do-not-contact, or otherwise inappropriate records are excluded.

MAKE THE FRONT DOOR RULE-DRIVEN

Recommended Response & Booking Workflow

Step	Rule
1. Receive	Every inbound channel must land somewhere monitored and visible.
2. Assign	Each inquiry gets one owner immediately or by the next defined coverage window.
3. Acknowledge	If live contact is not made, send the approved acknowledgement for that channel.
4. Attempt	Make the human response attempt and record time/outcome.
5. Intake	Capture minimum fields: service need, location, timing, preferred contact, qualification, notes.
6. Book or Disposition	Book, schedule a future action, mark unqualified with reason, or close with explicit outcome.
7. Confirm	Send appointment confirmation and clear reschedule path.
8. Recover	Cancelled/no-show/unreachable appointments receive the defined

	recovery action.
9. Handoff	Booked/qualified opportunity enters the sales/CRM process with owner, notes, status and next step.

Management Response Targets

The business should choose targets it can actually staff and measure. For this fictional sample, management adopts a 10-minute business-hours acknowledgement target and a defined next-opening-window rule after hours. Those are company operating targets for the example—not universal benchmarks or guarantees.

7-Day Response / Booking Follow-Up Playbook

Timing	Action
Day 0	Respond/acknowledge, make first human attempt, ask one booking-driving question.
Day 1	Second attempt using the alternate appropriate channel when available.
Day 3	Short service/timing question; remove one obvious booking obstacle.
Day 5	Offer a clear next step or alternate time window.
Day 7	Close-loop message: book now, schedule later, or close for now.

USE, PERSONALIZE, MEASURE

Ready-to-Customize Response & Booking Templates

1. Missed-Call Text

Hi [First Name] — this is [Name] with [Company]. Sorry we missed your call about [service/need if known]. I can help get you pointed in the right direction. Is now a good time to call you back, or would you rather handle the first step by text?

2. Web / Form Inquiry Response

Hi [First Name] — thanks for reaching out to [Company] about [service]. I received your request. The quickest next step is to confirm [one key intake item] and then I can help with scheduling. Is [simple question] correct?

3. Voicemail Return Message

Hi [First Name], this is [Name] with [Company] returning your call. I'm calling about your request for [service]. I'll also send a

short text so you have an easy way to reply. You can reach me at [number] when convenient.

4. Booking Confirmation

You're scheduled with [Company] for [day/time/window] regarding [service]. If anything changes, reply here or use [approved reschedule method]. [Optional preparation instruction]. We'll see you then.

5. Cancellation / No-Show Recovery

Hi [First Name] — I saw that today's appointment did not happen. If you still want help with [service], I can get it rescheduled. Would [option A] or [option B] work better?

6. Close-the-Loop

Hi [First Name] — I don't want to keep chasing you if the timing is not right. Should we schedule the [service], circle back later, or close the request for now? A short reply is completely fine.

TURN THE AUDIT INTO AN OPERATING HABIT

30-Day Priority Action Plan

Period	Actions
Days 1–7 — Stabilize	Assign channel ownership; define response target; standardize missed-call/web acknowledgement; require minimum intake fields; work the recent cleanup queue.
Days 8–14 — Standardize Booking	Document booking fallback when preferred times are unavailable; standardize confirmation; implement cancellation/no-show recovery; require reasons for unbooked inquiries.
Days 15–30 — Measure & Improve	Review response-time exceptions; compare channel booking outcomes; improve common unbooked reasons; tighten handoff into CRM; keep a weekly front-door review.

Weekly Front-Door Management Review

Metric	Review
Inbound volume	Count by channel and business-hours/after-hours
Missed / unanswered	Count and whether each received the required recovery action

Response-time exceptions	Inquiries outside the company's target or with no timestamp
Booked / unbooked	Outcomes by channel and reason
Stale recent inquiries	No booking, no close reason, no dated next action
Cancellations / no-shows	Recovered, rescheduled, unresolved
Handoff quality	Booked/qualified opportunities with owner, usable notes and next action

15-minute rule: identify exceptions, assign an owner, decide the next action, and close records that are genuinely finished. Do not turn the meeting into a general sales meeting.

MINIMUM VISIBILITY WITHOUT A NEW SOFTWARE PROJECT

Inbound Lead & Booking Tracking Framework

Field	Purpose
Inquiry ID	Internal reference only
Received Date/Time	When the inquiry arrived
Channel	Phone, web, text, email, etc.
Coverage Window	Business hours / after hours
Answered?	Yes / No
First Response	Timestamp or elapsed minutes if available
Owner	Person responsible
Qualification	Qualified / Unqualified / Unknown
Booking Outcome	Booked / Not Booked / Future Timing / Closed
Appointment Date	If booked
Confirmation Sent?	Yes / No / N/A
Outcome	Attended / Rescheduled / Cancelled / No-show / Open
Reason	Specific unbooked/closed reason

Next Action / Date	Required for unresolved inquiry
Notes	Only material context; avoid unnecessary PII

What Not to Do Yet

- Do not buy a new CRM solely because missed calls exist.
- Do not add complex automation before channel ownership and outcome reasons are consistent.
- Do not judge employees on response-time metrics that are not reliably captured.
- Do not treat every missed inquiry as a lost sale or every unbooked inquiry as recoverable.
- Do not expand into dispatch optimization until the booking handoff itself is stable.

ORDER OF OPERATIONS

Final Recommendation

If Harbor Ridge makes only one immediate change, it should be this: every inbound inquiry that does not produce an immediate booking must still receive one clear owner, one explicit status, and one dated next action—or a documented close reason.

That single rule addresses the biggest weakness in the fictional sample because it prevents missed calls, after-hours forms, unavailable booking times, cancellations, and unanswered follow-ups from becoming invisible.

What the Client Leaves With

- A 60-point diagnostic of the front-door conversion process.
- A clear picture of where inbound inquiries are being missed, delayed, poorly documented, or left unresolved.
- A recent cleanup queue when the data supports responsible re-contact.
- A response and booking workflow the team can follow without buying new software.
- A 7-day follow-up playbook and six ready-to-customize messages/scripts.
- A 30-day action plan, weekly management review, and tracker for ongoing visibility.

Scope Note

This audit is a diagnostic and recommendation engagement based on information supplied by the client. It does not include live call handling, mystery shopping, campaign execution, CRM cleanup, data migration, software configuration, automation setup, legal/compliance review, employee training, dispatch optimization, sales management, or any guarantee of bookings, sales, or revenue unless separately agreed.

All data in this sample is fictional and provided only to demonstrate the format and analytical approach of the service.