

They replied. Who is up next?

THE LEAD HANDOFF CHECK / FOR HOME SERVICE BUSINESS OWNERS

A reply is not a booked job.

A lead can be in your system and still have no next step. That leaves you checking texts at night and trying to recall who needs what. Use this check to get the next move out of your head.

1 Open 10 live leads.

Use your last 10 leads that are still open. Check the last message in each thread. Include calls, texts, email and web leads. Have fewer than 10? Use all of them. Start with a 15-minute timer; finish later if needed.

2 Ask: who has the next move?

Did they ask you a question? Then your team is up. Did you ask them one? Check the plan for a reply. If a visit is booked, check the next task. If they said no or asked you to stop, close the lead and stop follow-up.

3 Give each open lead a clear plan.

Write one team owner, one next step and one due date on page 2. If you are waiting on them, set an internal review date. Do not treat that date as a reason to send another text.

THE GAP TO LOOK FOR

A customer replies. An auto-message stops. No person picks it up.

If you use AI or auto-texts, check the handoff. Make sure the team owner sees the reply and takes the next step. Check the thread before any new message.

Keep the win: review due rows at a set time each day. Hand off the work, then use that space to lead your team or get home with less on your mind.

One lead. One owner. One next move.

Type into this PDF, or print it. Keep the filled copy with your team.

Check the latest thread first. Use initials or a job code; skip private details.

Owner = person on your team. Date = task due or internal review date.

LEAD / JOB	TEAM OWNER	NEXT STEP	DATE
K-01	Sam	Answer their sink question	Oct 20

Made-up example

Flag any row with no owner, next step or date. Fix those gaps first.

Before: ____ open leads had a gap. After: ____ still need a plan.

Need a draft? Ask your approved AI tool:

"From these redacted notes, list the next step, team owner and date. Use only facts. Mark gaps as NOT SET. Draft only; do not send." Check its work.

Want this built into your lead system?

Talk with Rob: stackedsystems.com/#conversation