AUDIT YOUR DEAD LEADS — FIND THE HIDDEN MONEY IN YOUR LIST

SQUARE 1 GROUP

YOU ALREADY PAID FOR THOSE LEADS. THEY GHOSTED — NOT BECAUSE THEY WEREN'T INTERESTED, BUT BECAUSE LIFE GOT IN THE WAY. LET'S BRING 'EM BACK.

DEAD LEADS

INSTRUCTIONS:

Most founders think they need new leads when they're sitting on a goldmine of old ones. This worksheet helps you dig through your CRM, inbox, or spreadsheets to find:

- Contacts who ghosted before booking
- Past prospects who said "not now"
- Lost deals that went cold after follow-up

By the end, you'll have a clean, segmented list of people who already know you — the easiest group to re-engage and convert.

THE GUIDE:

STEP 1:
Locate Every Lead Source

Fill in the blank:
My leads come from ________.

Example: "Facebook ads, Calendly forms, and email inquiries."

- List every system that captures names — don't miss anything.

STEP 2:
Export Your Contacts

- Pull data from each source into one sheet.

Include: Name, Email, Phone, Status, Date of Last Contact.

Fill in the blank:
Total contacts exported: _____

STEP 3:
Filter Out Active Leads

- Remove anyone who's currently in your pipeline or booked a call recently.

These are your alive leads — we're focusing on the cold ones.

Fill in the blank:
After filtering, I have _____ cold leads left.

STEP 4:
Segment by Last Contact Date

Create buckets:

- ☐ 30–60 days cold
- ☐ 61–120 days cold
- ☐ 120 + days cold

Fill in the blank:
Most of my dead leads fall in the __________ range.

- This helps you prioritize who's still warm enough to revive.

STEP 5:
Tag by Lead Type

Add a column in your sheet: Lead Type = Buyer / Seller / Client / Vendor / Referral. (Adjust to your industry.)

Fill in the blank:
My primary lead types are __________.

- Later, your messages will be personalized per tag.

STEP 6:
Identify Why They Went Cold

Skim past messages or call notes. Mark each lead with a reason:

- ☐ Timing was off
- ☐ Budget issue
- ☐ Ghosted after proposal
- ☐ Went with someone else
- ☐ Unresponsive from day one

Fill in the blank:
The most common reason my leads went cold is __________.

STEP 7:
Flag the "Worth Reviving" Ones

Use this rule: If you believe there's a 10 % chance they'd say yes now, keep them.

- Tag those as "RE-ENGAGE."

Fill in the blank:
I flagged _____ leads to revive this week.

STEP 8:
Create a "Never Again" List

- Remove leads who were rude, bad fits, or time-wasters.

You don't want to pollute your data.

Fill in the blank:
I removed _____ leads that I'll never contact again.

STEP 9:
Clean Up Duplicates + Emails

- Deduplicate your list and verify emails/phone numbers.

A clean list = better deliverability when we email/text them later.

Fill in the blank:
My final revival list has _____ contacts.

STEP 10:
Save and Tag Inside CRM

Upload your clean list and tag them as: **"Re-Engagement Batch #1."**

- This is the segment you'll message for the rest of the week.

Why It's Important:

You can't revive what you can't see. Most founders have dozens — sometimes hundreds — of dormant leads who already know their name and brand. Once you clean and tag that list, you can send the right message at the right time… and watch dead leads come back to life.

Need help cleaning and tagging your CRM before tomorrow's step? Book a free strategy session:

square1grp.com/brainstormsession

You've got your revival list.

Tomorrow we'll craft your Revival Offer — the irresistible, low-friction incentive that gets those people to reply fast.