AUTOMATE & TRACK IT —
BUILD THE SYSTEM THAT NEVER SLEEPS

SQUARE 1 GROUP

YOU CAN'T "BE FASTER" — BUT YOUR SYSTEM CAN. TODAY, YOU'LL AUTOMATE EVERYTHING SO EVERY LEAD GETS CONTACTED INSTANTLY, EVERY TIME.

AUTOMATION AND TRACKING

INSTRUCTIONS:

You've done the hard work:

- You know your current response time.
- You've designed your workflow.
- You've written your auto-responses.

Now we wire it all together.

This worksheet will help you:

1. Build the automation that fires instantly when a lead comes in
2. Add tagging and routing rules for clarity
3. Track your speed to lead daily — so it stays tight

This is where your hustle turns into infrastructure.

THE GUIDE:

STEP 1:
Choose Your Tech Stack

Fill in the blank:
CRM: __________
Automation Tool: __________
SMS/Email Service: __________
Notification Channel: __________

Example: GoHighLevel + Twilio + Gmail + Slack

- Use what you already have — no new shiny tools.

STEP 2:
Set Your Trigger Point

Fill in the blank:
The automation will trigger when ____.

Example: "A new lead is added to my CRM" or "A form submission is received."

- Be specific — that's your starting gun.

STEP 3:
Add an Instant Notification

Fill in the blank:
I'll get notified immediately via ______.

Example: "SMS + Slack message."

- Redundancy = reliability.

STEP 4:
Send the Auto-Response (SMS/Email)

- ☐ Add your script from Day 3 as the automated message.
- ☐ Use merge fields: [First Name], [Service Type], [Lead Source].
- ☐ Test for mobile readability — short, fast, friendly.

Fill in the blank:
My auto-response will send ___ seconds after lead capture.
Example: "Within 30 seconds."

STEP 5:
Assign Ownership or Routing

Fill in the blank:
Every new lead will be assigned to __________.

Example: "VA via Slack notification" or "Myself until team expands."

- Never let a lead float unassigned — that's where response time dies.

STEP 6:
Build in Escalation Rules

Fill in the blank:
If no response after 5 minutes → alert __________.
If still uncontacted after 15 minutes → escalate to __________.

Example: "Slack ping to myself → SMS to phone."

- Accountability beats automation.

STEP 7:
Tag and Track Every Lead

Set up tagging in your CRM:

Status	Definition
"New Lead"	*Just came in*
"Contacted"	*Replied or called*
"Booked"	*Appointment scheduled*
"Cold"	*No response after 3 attempts*

Fill in the blank:
I'll review and update tags every __________.
Example: "Morning at 8 AM."

STEP 8:
Create a Speed Tracker Sheet

Columns to include:
| Date | Lead Source | Time Received | Time Contacted | Delay (min) | Status | Notes |

- Track for one week.
- Color-code delays (green <5 min, yellow <15, red >15).

Fill in the blank:
My average response time goal is ___ minutes.

STEP 9:
Test the Whole Flow

- Submit a test lead form.
- Confirm notification hits within seconds.
- Confirm the auto-text/email fires correctly.
- Verify tags and CRM updates.
- Check your tracker sheet records it.

Fill in the blank:
My test result = Notification received in ___ seconds.

STEP 10:
Set a Daily Check Rhythm

Fill in the blank:
Every morning, I'll check my tracker for __________.

Example: "Missed leads and slow responses."

Every Friday, I'll review my average response time for the week.

- What gets tracked gets improved.

Why It's Important:

Leads die in the gap between interest and response. When your system replies instantly and tracks every touch, you'll never lose another lead to someone who's just "faster." Automation doesn't replace hustle — it amplifies it.

Need help auditing your lead response system or building notifications in your CRM? Book a free strategy session:

square1grp.com/brainstormsession

You've built your Speed-to-Lead machine. Tomorrow, we'll bundle everything — the workflow, scripts, tracker, and metrics — into The Speed-to-Lead Playbook so you can scale it or hand it off to a VA.