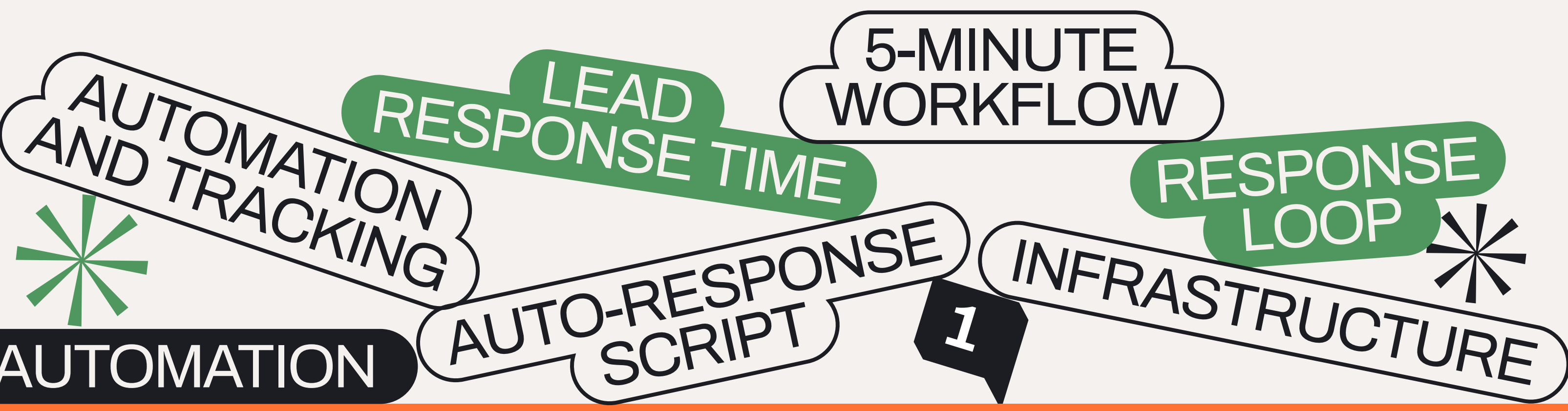
SQUARE 1 GROUP

THE SPEED-TO-LEAD WORKBOOK

Audit your response time, build a 5-minute follow-up system, and win leads while others are still typing.



AUDIT YOUR LEAD RESPONSE TIME — YOU CAN'T FIX WHAT YOU DON'T MEASURE

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EVERY MINUTE YOU WAIT TO FOLLOW UP COSTS YOU MONEY.
TODAY YOU'LL FIND OUT EXACTLY HOW MUCH.

LEAD RESPONSE TIME

INSTRUCTIONS:

Speed to lead is the single biggest multiplier in your sales system. If you're taking hours (or days) to respond to inbound leads, you're basically lighting ad spend on fire.

This worksheet helps you:

- Measure how fast you respond now
- Identify the bottlenecks slowing you down
- Set your 5-minute response goal

You'll use this data tomorrow to design your instant-response workflow.

THE GUIDE:

STEP 1:
Where Your Leads Come From

Fill in the blank:
My leads usually come from ___________.

Example: "Facebook ads and my website contact form."

STEP 2:
How You're Notified Right Now

Fill in the blank:
When a lead comes in, I get notified via ___________.

Example: "Email only — no text or Slack alert."

STEP 3:
Track Your Average Response Time

Look at the last 5 leads and fill this in:

Lead	Time Received	Time Contacted	Delay
1			
2			
3			
4			
5			

Calculate your average delay: _____ minutes.

STEP 4:
Classify Your Speed

Multiple choice:

☐ Under 5 min = Elite (you're a weapon)
☐ 6–15 min = Competitive
☐ 16–60 min = Average
☐ 1–3 hours = Danger zone
☐ 4 hours + = You're losing money

STEP 5:
Find the Delay Point

Fill in the blank:
Most of the delay happens because ___________.

Example: "I don't check email frequently enough or I manually assign leads in CRM."

STEP 6:
Identify Your "Reaction Chain"

List every step that happens between lead capture and first contact.

Example: Form → Zapier → CRM → Email notification → I open laptop → Text the lead

Count the steps. If you have more than 3, you already lost.

STEP 7:
Measure Your Lost Deals

Fill in the blank:
In the last month, I lost approximately ___ leads because I responded too slowly.

Example: "8 out of 20 inquiries ghosted before I called back."

STEP 8:
Set Your New Speed Goal

Fill in the blank:
By the end of this week, I'll respond to new leads within _____ minutes 100 % of the time.

Example: "5 minutes or less."

STEP 9:
Define "First Contact"

Clarify what counts as a response in your business:

☐ Phone call
☐ Text message
☐ Email reply
☐ DM

(Pick one — your system will automate this tomorrow.)

STEP 10:
Score Your Current System

On a scale of 1–10, how confident are you that you won't miss a new lead notification? ___ / 10

If under 7, you have a system problem — not a discipline problem.

Why It's Important:

Speed to lead is the fastest way to increase conversion without changing your offer or ads. If you're not first to call, text, or DM, someone else is. Awareness is step one — tomorrow you'll build the automation that makes "instant response" your new normal.

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

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You just measured your reaction time.

Tomorrow, we fix it. We'll map out your 5-Minute Workflow — the system that notifies, contacts, and assigns leads automatically.

DESIGN THE 5-MINUTE WORKFLOW — RESPOND BEFORE YOUR COMPETITORS EVEN WAKE UP

SQUARE 1 GROUP

SPEED ISN'T LUCK — IT'S LOGISTICS. TODAY YOU'LL BUILD THE SYSTEM THAT MAKES 5-MINUTE FOLLOW-UPS AUTOMATIC.

5-MINUTE WORKFLOW

INSTRUCTIONS:

Yesterday, you found your weak spot — where leads slip through the cracks. Today you'll architect the exact workflow that eliminates those delays.

This isn't about adding more apps — it's about creating a **tight response loop**:

- Instant notification.
- Immediate message or call.
- Consistent tracking.

By the end, you'll have your own 5-Minute Workflow — a sequence of triggers, tools, and messages that fire every single time a new lead comes in.

THE GUIDE:

STEP 1:
Start with the Source

Fill in the blank:
My leads enter the system through __________.

Example: "Facebook lead form" or "Website contact form."

- Identify every capture point — ad forms, chat widgets, Calendly, etc.

STEP 2:
Choose Your Notification Channel

Fill in the blank:
I'll get alerted instantly via __________.

Example: "SMS and Slack, not just email."

- Use redundancy — two notifications are better than one.

STEP 3:
Choose Your Primary Follow-Up Channel

Multiple choice:

- ☐ Call first, text second
- ☐ Text first, call second
- ☐ Email first, then call

Pick one — your automation will trigger this method first every time.

STEP 4:
Map the Ideal 5-Minute Sequence

Use this skeleton and customize it:
Lead Form → CRM → Instant Notification → Automated Text → Manual Call → CRM Tag/Status Update

Fill in the blank:
My version looks like: __________.
Example: "Lead form → Zapier → GoHighLevel → SMS + Slack → Call → Tag: 'Contacted.'"

STEP 5:
Select Your Tools

Fill in the blank:
CRM: __________
Automation Tool (if separate): __________
Communication Tool: __________
Notification Tool: __________

Example: "I don't check email frequently enough or I manually assign leads in CRM."

- Example combo: GoHighLevel + Twilio + Gmail + Slack.

STEP 6:
Assign Ownership

Fill in the blank:
The person responsible for responding within 5 minutes is __________.

Example: "Me" or "VA via shared inbox."

- If it's not clear who owns the first response, you don't have a system — you have chaos.

STEP 7:
Define Escalation Rules

Fill in the blank:
If no one responds within 5 minutes → send an alert to __________.
If no one responds within 15 minutes → escalate to __________.

Example: "If no response after 5 min → Slack DM me. After 15 → send SMS alert."

- Build in accountability — machines don't forget.

STEP 8:
Set Your Lead Status Flow

Use this table to define how leads move through your system:

Status	Definition	Action
New	*Form submitted*	*Auto-text + Slack alert*
Contacted	*Manual call made*	*Update tag*
Booked	*Call scheduled*	*Move to "Appointments" pipeline*
No Response	*3 attempts made*	*Trigger Nurture Sequence*

Fill in the blank:
My CRM statuses will be: __________.

STEP 9:
Build Your "Same-Day Callback" Rule

Fill in the blank:
Any uncontacted leads by 4 PM will trigger __________.

Example: "An auto-text reminder + Slack notification to reattempt contact."

- Daily accountability = no wasted leads.

STEP 10:
Summarize Your Workflow

Write it out clearly:

When a lead comes in from [source], I get notified by [channel] within [time].
The system automatically [action].
If no one responds, [escalation rule].
All tracked in [CRM/tool].

Example: "When a lead submits our Facebook form, GoHighLevel sends me and my VA an SMS and Slack ping within 30 seconds. A text goes out instantly, and if no one replies by 5 minutes, Slack pings again. We call within 10."

Why It's Important: Speed doesn't come from motivation — it comes from automation. This workflow ensures no lead gets ignored, no message gets missed, and your system never sleeps. When your process fires faster than everyone else's, you stop competing — you dominate.

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

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You've mapped your 5-Minute Workflow. Tomorrow we'll write the auto-response scripts — so when leads come in, they hear from you instantly (and it actually sounds human).

WRITE YOUR AUTO-RESPONSE SCRIPTS — SOUND HUMAN, NOT LIKE A ROBOT

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LEADS DON'T GHOST BAD OFFERS — THEY GHOST BAD MESSAGES.
LET'S FIX THAT IN UNDER 15 MINUTES.

AUTO-RESPONSE SCRIPTS

INSTRUCTIONS:

Your automation is useless if your message sounds like a bot. This worksheet helps you craft text and email responses that:

- Sound natural and conversational.
- Build immediate trust.
- Prompt quick replies or bookings.

By the end, you'll have plug-and-play scripts for:

1. Instant SMS / text message
2. Instant email follow-up
3. "No reply" bump message
4. Same-day re-engagement

Keep your tone simple, human, and direct. Think: "one real person texting another."

THE GUIDE:

STEP 1:

Identify Your Persona

Fill in the blank:
My message should sound like __________.

Example: A friendly advisor, not a pushy salesperson

- Tone sets the vibe — casual, confident, or consultative.

STEP 2:

Define Your Immediate Goal

Fill in the blank:
The only thing I want them to do after the first message is _______.

Example: "Reply or click to book a call."

- Keep one clear CTA per message — no multi-step confusion.

STEP 3:

Write Your Instant Text Message (under 160 chars)

Template:
"Hey [first name], saw your [inquiry/download/form]. Quick question: are you looking for help with [problem] right now or just exploring?"

Fill in your version:
"Hey [first name], __________?"
Example: "Hey John, saw your request for help with your medspa ads — are you still trying to book more appointments this month or planning ahead?"

- Always end with a question — it triggers engagement.

STEP 4:

Write Your Instant Email Response

Template:
Subject: Quick follow-up on your request

Hey [first name],
Just saw your [form/opt-in] come through — wanted to make sure you got what you were looking for.
Curious — what's your main goal right now with [pain point or service]?
– [Your Name]

Fill in your version:
Subject: __________
Body: __________

STEP 5:

Write Your "No Reply" Follow-Up (sent 24 hrs later)

Fill in the blank:
"Hey [first name], just checking back. Still need help with [problem]? Totally fine if timing's off — just let me know where you're at."

Fill in your version:
"Hey [first name], __________."

- Non-needy tone = higher reply rate.

STEP 6:

Write Your Same-Day Re-Engagement (if they open but don't reply)

Template:
"Hey [first name], noticed you checked out my message earlier. Timing might've been off — want me to hold a time for you this week?"

Fill in your version:
"Hey [first name], __________."

- Use pattern interrupts — acknowledge their behavior naturally.

STEP 7:

Add Personalization Tags

Fill in the blank:
I'll personalize my messages with __________.

Example: "Lead source, service type, or local area name."

- Example: "Hey [first name], saw your [Facebook ad inquiry] — quick question…"

STEP 8:

Decide Message Timing

Fill in the blanks:
Instant text = 0 min
Email = within ___ min
Bump message = after ___ hrs
Re-engagement = after ___ hrs

Example: Email at 3 min, bump at 24 hrs, re-engagement at 48 hrs?

- Consistency builds trust.

STEP 9:

Create a "Friendly Sign-Off" Line

1. "Talk soon!"
2. "Hope this helps."
3. "Appreciate your time."
4. "Cheers, [Your Name]."

- No corporate BS — sound like a real human.

STEP 10:

Review Your Scripts Out Loud

Read each one and ask:

1. Does this sound like me?
2. Would I reply to this?
3. Is there one clear next step?
4. Is it short enough to read in 3 seconds?

Fill in the blank:
My favorite line from my scripts is: _______.

Why It's Important: Automation gets you speed. Messaging gets you response. You can have a Ferrari-fast system, but if the message sounds like spam, no one answers the door. Your new scripts fix that — fast, clear, personal.

Need help installing these auto-responses into your CRM or text platform? Book a free strategy session:

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You've written the messages that start the conversation. Tomorrow, you'll connect them all — we'll automate and track your entire 5-minute response system so it runs while you sleep.

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:

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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.

Speed wins deals

Over 4 worksheets, you'll build a system that makes sure every lead hears back — fast, on-brand, and ready to book.

By the end, your inbox won't just get leads… it'll close them.

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