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The Customer Follow-Up Checklist

The five things every active lead should show before follow-up is considered complete.

01 LEAD OWNERSHIP

- [ ] A specific person owns the lead.
- [ ] The current pipeline stage is accurate.
- [ ] The lead has not been left under a team or general account.

02 LAST CONTACT

- [ ] The date and method of the last contact are documented.
- [ ] The outcome is recorded.
- [ ] “Called,” “emailed,” or “followed up” is not used without context.

03 OPEN DECISION

- [ ] The customer’s question, concern, or delay is documented.
- [ ] Any promised information or estimate has been sent.
- [ ] The CRM shows what must happen before the lead can move forward.

04 NEXT ACTION

- [ ] The next step is specific.
- [ ] One person owns it.
- [ ] It has a due date.
- [ ] The customer knows what to expect, when appropriate.

05 ESCALATION

- [ ] The manager knows when to step in.
- [ ] Overdue follow-up is visible.
- [ ] Stalled leads have a defined review point.

× BEFORE	✓ AFTER
Called customer. No answer. Will follow up.	No answer. Estimate sent Monday. Jordan will call Thursday afternoon. Escalate Friday if there is no response.

If someone else can open the CRM and know what happens next, the follow-up is documented.

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