ILLUSTRATIVE GROWTH PLAN

# Find the missing connection.

A fictional local service business receives inquiries, but follow-up is inconsistent. This sample shows the structure of a plan, not a completed client audit.

## 1. Define the useful outcome

A clear owner and next action for every valid inquiry, with visibility into requested and confirmed appointments. Establish a baseline before setting targets.

## 2. Map the current path

Visitor discovers service > website form > shared inbox > manual response > appointment request. Record who receives the inquiry, where it is stored and what happens if nobody responds.

## 3. Ask the right questions

Which channels generate inquiries? Are reply details reliable? Who owns the first response? How are follow-ups recorded? Can the team distinguish an appointment request from a confirmed booking?

## 4. Prioritize the first changes

**First:** capture a reply address and save the inquiry reliably.
**Next:** assign an owner and a follow-up deadline.
**Then:** connect appointment requests and record the actual outcome.

### Your current bottleneck

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# Agree the work before building.

Translate the priority into a bounded scope, with clear responsibilities and a handover the team can use.

## Discovery and approval

Review the website, offer and workflow. Confirm the selected services, required integrations and success measures. Agree scope and commercial terms separately before paid work begins.

## Build and connect

The agreed work may include service pages, accessible forms, CRM routing, notification rules, follow-up reminders and appointment requests. List inclusions, exclusions and any third-party dependencies.

## Test the important paths

Try a valid inquiry, missing/invalid contact details, a delivery failure and a duplicate retry. Confirm staff permissions, mobile behaviour and how the team recovers a failed notification.

## Handover checklist

[ ] Named business owner and technical contact
[ ] Account ownership, access and licences documented
[ ] Third-party subscriptions and responsibilities agreed
[ ] Team instructions for each lead stage
[ ] Support boundaries and review date agreed

### Dependencies to resolve

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# Measure what actually happens.

Use an agreed review period. Do not substitute page views, email acceptance or unconfirmed requests for booked business.

## Measurement worksheet

| Measure | Baseline / period | Review / period |
|---|---|---|
| Valid inquiries | | |
| Median first response time | | |
| Qualified opportunities | | |
| Appointment requests | | |
| Confirmed appointments | | |
| Completed sales / engagements | | |

**Read the numbers together.** A higher inquiry count can still produce fewer appointments. Review lead quality, response speed, qualification and booking outcomes in context.

**Choose the next action.** Keep what helps, investigate a measured bottleneck and agree the next change. No specific lead volume, conversion improvement or revenue is guaranteed.

## Next step

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