FREE GUIDE: SPEED TO LEAD

Respond faster. Give your agency the first conversation.

A practical speed-to-lead guide for handling new inquiries promptly and giving prospects a clear next step. It covers recording, ownership, acknowledgment, booking, out-of-hours inquiries, follow-up and measurement.

How to use this guide: work through it with the people who handle new inquiries. Use your agency's approved wording and follow your own compliance rules. Faster responses can help, but no approach guarantees appointments or new business.

1 Record when every inquiry arrives

You cannot improve a response you cannot see. Make sure every new inquiry is logged with the date, the time and where it came from: phone, voicemail, website form, chat, email or social message.

- Send website forms and chat to one shared place, not to one person's inbox.
- Log missed calls and voicemails as inquiries too, not just answered calls.
- Record the channel the person used, so you can reply the same way if they gave you permission.

This week: send a test inquiry through every route you offer and check where each one lands.

2 Assign one clear owner

Inquiries wait longest when everyone assumes someone else has replied. Decide who owns new inquiries at each time of day, and who covers when that person is with a client, on leave or out of the office.

- Name a primary owner and a backup for every working day.
- Agree a target first-response time your team can actually keep, for example within business hours on the same day.

- Agree what happens if the owner cannot respond in time: who is alerted, and how.

3 Acknowledge receipt straight away

A short acknowledgment tells the person their inquiry arrived and what happens next. It can be sent automatically for forms and chat. It should not give advice or quote prices.

> **EXAMPLE ACKNOWLEDGMENT (EMAIL)**
>
> Hi Sam, thanks for contacting Lakeside Insurance Agency. We have your message and a member of our team will reply during business hours. If you would like to choose a time to talk, you can book a call here: [booking link]. If your question is urgent, call us on [number].

Keep it short, use your agency's approved wording and include your agency name so the message is easy to recognize.

4 Offer booking or a callback

Many people prefer to choose a time rather than wait to be called. Give every new inquiry a simple next step.

- A booking link for a short call, with the times your team can actually keep.
- A callback request option that asks for the best number and preferred time.
- Clear confirmation and reminder messages once a time is booked.

Add the same next step to your website, voicemail greeting, acknowledgment message and social profiles.

5 Handle out-of-hours inquiries

Inquiries arrive in the evening and on weekends. Decide in advance what the person sees and hears outside business hours.

- An out-of-hours voicemail or receptionist message that states when you will respond and offers a way to book.
- An automatic acknowledgment for forms and chat that sets the same expectation.
- A first task for the morning: review and respond to everything that arrived overnight.

Be honest about timing. Do not promise a reply sooner than your team can deliver.

6 Follow up appropriately

A busy person may not reply to the first message. Agree a short follow-up plan so it does not depend on someone remembering.

- Use the channels the person used or agreed to. Check your agency's consent rules before sending texts or making follow-up calls.
- Keep it brief: for example a reply on the first day, a second message two days later and a final message about a week later.
- Stop when the person replies, books or asks you not to contact them, and record that on their file.

7 Measure response time and outcomes

Track a few simple numbers every month. You only need a spreadsheet or your lead system.

Measure	How to record it
Time to first response	Time the inquiry arrived and time of the first real reply.
Inquiries with a next step	Booked, callback scheduled, or still open.
Appointments held	Booked calls or meetings that took place.
Outcome	Your own record of whether the inquiry became a customer.

Look for patterns, such as which channel or time of day has the slowest replies. Responding quickly gives you a better chance of a conversation, but it does not guarantee that the person will book or buy.

8 Implementation checklist

- [ ] Every inquiry route sends to one shared place, with date, time and source recorded.
- [ ] A named owner and a backup cover each working day.
- [ ] A target first-response time is agreed and written down.
- [ ] An approved acknowledgment message is set up for forms and chat.
- [ ] Every route offers a booking link or a callback request.
- [ ] Out-of-hours callers and website visitors are told when you will respond.

- [ ] A short follow-up plan is agreed, with clear stop points and consent checks.
- [ ] Response time, next steps, appointments and outcomes are reviewed monthly.

9 Quick self-check

Answer these with your team. Any “no” or “not sure” is a good place to start.

- If someone called your main number right now, would they reach a person, a useful message or a way to book?
- When your last website inquiry arrived, who saw it first, and how long did the first reply take?
- Can a new prospect book a time or request a callback without phoning during business hours?
- Who decides when follow-up stops for an inquiry that has not replied?
- Could your team list every open inquiry from the past two weeks, with its owner and next step?

FICTIONAL EXAMPLE

Lakeside Insurance Agency is a fictional, two-person agency. On a busy Tuesday a caller asks about home coverage while both staff are with clients. Nobody answers, so the caller fills in the website form. The form goes to a shared inbox nobody checks until Thursday. After working through this guide, the agency adds a callback request option, an automatic acknowledgment for form inquiries and a daily check of open inquiries with a named owner.

See how this could work for your agency.

In a 20-minute demo you can hear the virtual receptionist, see an inquiry captured and watch the next step.

Book a 20-minute demo: calendly.com/katiehoneychurch57/demo

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