MODULE 10: EMAIL, CRM AND FOLLOW-UP

Your inquiry-to-booking pipeline

Lesson: Module 10 workshop: an inquiry-to-booking pipeline · about 18 minutes

Build and document the complete pipeline that takes every inquiry to a booking and beyond.

Your business (name, service, main city):

1. **Draw your pipeline map: list each stage with its trigger, owner and next step with timing.**

2. **List the CRM fields you have and the ones you need to add, including consent and trigger dates.**

3. **Write the questions on your rebuilt inquiry form and the wording of your separate consent box.**

4. **List the templates attached to each stage and mark which are automated and which stay personal.**

5. **Calculate your weighted pipeline for this month and compare it with your target.**

6. **Write the day and time of your weekly pipeline review and the six questions you will ask.**

Check: can you now

- Map every stage from first inquiry to rebooking, with an owner and a next step for each
- Set up the CRM fields, form, templates and reminders that run the pipeline
- Run a weekly pipeline review and calculate the revenue your pipeline is likely to produce

One change you will make this week