MAESTRO / FIELD GUIDE

Lead follow-up checklist

Find where enquiries get lost

Trace one submission from the form to the next message.

Worked example: Cedarfield Systems (fictional)

01 THE PROMISE

What did the form promise?

CHECK

Open the ad and form. Write down the asset or reply a person expects.

ILLUSTRATIVE EXAMPLE

Cedarfield’s form says “Get the demand planning guide.” The next page should give them that guide.

02 THE RECORD

Did the submission arrive with context?

CHECK

Send a test entry. Check the contact record for the request, source and permission choice.

ILLUSTRATIVE EXAMPLE

The test record shows “Demand planning guide” and the consent choice. The team can see why this person came.

03 THE DELIVERY

Can they open what you promised?

CHECK

Submit from a personal inbox. Open the link on the confirmation page and in the delivery email.

ILLUSTRATIVE EXAMPLE

Cedarfield’s confirmation page opens the guide. The email repeats the same direct link.

04 THE ROUTE

Who owns this enquiry now?

CHECK

Write the rule that sends each request to a named team or queue.

ILLUSTRATIVE EXAMPLE

Guide requests go to marketing follow-up. A separate “Talk to us” request goes to the sales queue.

05 THE FIRST REPLY

Does the reply fit the request?

CHECK

Read the first automated or human message as the person who submitted the form.

ILLUSTRATIVE EXAMPLE

A guide request gets the guide link and a starting page. A meeting request gets scheduling details.

06 THE EVIDENCE

Can you see what happened?

CHECK

Check the test record for asset delivery, owner, first message and current status.

ILLUSTRATIVE EXAMPLE

Cedarfield can see the guide delivery and marketing owner in the record. It can also see that the email went out.

07 THE REPAIR

What will you fix first?

CHECK

Pick one broken step. Give it an owner, make the change and rerun the same test.

ILLUSTRATIVE EXAMPLE

Cedarfield fixes a stale thank-you link, then opens the new guide link on a phone.