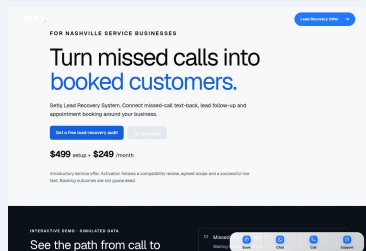


Dormant lead review worksheet

Review older enquiries before deciding whether to reconnect.



FROM THE SETLY PROJECT LIBRARY

A real project screenshot for visual inspiration. Follow the written steps for your own business.

YOUR ACTION PLAN

- 1 Identify the original request, last interaction and reason the enquiry stalled.
- 2 Check that the contact details and communication preferences remain appropriate.
- 3 Write a relevant reason to reconnect rather than inventing urgency.
- 4 Archive unsuitable records and record the next action for valid ones.

EXAMPLE - ILLUSTRATIVE

A lead waiting on new branding may be relevant after they tell you their branding is complete.

CHECK YOUR RESULT

Is there a legitimate, specific reason for this follow-up?

Dormant lead review worksheet

Use the prompts below to make this resource specific to your business. Save a local copy after completing it. Keep passwords and private customer data out of this worksheet.

Original request:

Last interaction:

Reason stalled:

Current relevance:

Preference check:

Decision:

DONE WHEN

Is there a legitimate, specific reason for this follow-up?

FURTHER READING

[HighLevel Support](#)

Independent Setly planning resource. Platform settings and requirements can change; use the linked official help for current configuration details.