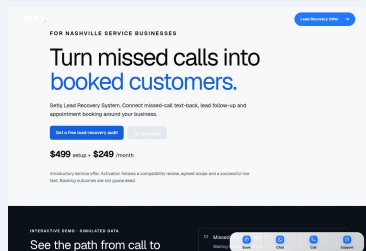


Lead recovery weekly review

Keep follow-up reliable without turning it into constant chasing.



FROM THE SETLY PROJECT LIBRARY

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

YOUR ACTION PLAN

- 1 Review unassigned enquiries and overdue next actions.
- 2 Check that replies and bookings stopped unnecessary automated messages.
- 3 Sample a few conversation histories for relevance and clarity.
- 4 Update owners, close completed enquiries and record one process improvement.

EXAMPLE - ILLUSTRATIVE

A booked client still receiving booking nudges signals a stop-rule problem worth fixing.

CHECK YOUR RESULT

Does every open enquiry have a justified next action?

Lead recovery weekly review

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.

Unassigned count:**Overdue count:****Stop-rule issues:****Quality observations:****Actions and owners:****DONE WHEN**

Does every open enquiry have a justified next action?

FURTHER READING

[HighLevel Support](#)

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