

CHECKLIST | FREE RESOURCE

CRM and Sales Follow-up Checklist

Who it is for	Owners and sales leads who want fewer leads to go quiet
What you will get	Check that every lead is captured, followed up on a schedule and handled in line with Canadian email rules.
Time needed	About 20 minutes

A CRM is a shared record of who you talk to and what happens next. It does not need to be fancy. It needs to be complete and used by everyone. Tick each statement that is true today.

Capture

- ☐ Every source of enquiries (website, phone, email, referrals) ends up in one list.
- ☐ Each lead has a name, a way to contact them, a source and a date.
- ☐ Duplicate contacts are merged.
- ☐ A new enquiry gets an automatic acknowledgement within minutes.

Follow-up

- ☐ Every open lead has a next step and a due date.
- ☐ Every lead has a named owner.
- ☐ There is a standard first reply that people edit for each lead.
- ☐ We have decided how many follow-ups to make before marking a lead as lost.

Pipeline

- ☐ Stages are named in plain words, for example New, Contacted, Quoted, Won and Lost.
- ☐ Quotes that have been sent are tracked with a follow-up date.
- ☐ We record why leads are lost.
- ☐ Someone reviews stalled leads every week.

Email consent (CASL)

This is general information, not legal advice. Canada's Anti-Spam Legislation applies to commercial electronic messages.

- ☐ We know whether we have express or implied consent before sending a marketing email.
- ☐ Every marketing email says who we are and how to contact us, and has a working unsubscribe link.
- ☐ Unsubscribe requests are processed within 10 business days.
- ☐ We keep a record of how and when each person gave consent.

Reporting

- ☐ Each month we can see how many leads came in, how many were quoted and how many were won.
- ☐ We can see which sources bring in work, not just leads.

How to read your score

Count your ticks and find your range.

0 to 7 ticks	Start with capture and follow-up. Get every lead into one list with a next step and a date.
8 to 13 ticks	You have a working process. Focus on the unticked items in Follow-up and Email consent.
14 to 18 ticks	Your process is strong. Look at which reminders and replies could be automated.

Next step

Need help putting this into practice? Talk to NEXORA about setting up your CRM and follow-up reminders.

Talk to NEXORA: growth@nexorayyc.io | nexorayyc.io/contact

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