



SELF-AUDIT SCORECARD

HVAC Lead Recovery **Self-Audit**

Score your current process across response speed, missed calls, estimate follow-up, booking, and customer reactivation.

THE LEAD JOURNEY



CAPTURE



RESPOND



BOOK



RECOVER



HOW TO USE IT

Score each statement from 0 to 2

Complete the audit based on what happens **consistently** — not what the process is supposed to do.



No system

This does not happen reliably today.



Partly controlled

It happens, but depends on a person remembering.



Systemized

It is documented, tracked, and consistently executed.



MAXIMUM SCORE • 50

There are 25 statements across five sections. Add the scores at the end.



SECTION A

Lead response speed



© CIRCLE 0, 1, OR 2 FOR EACH STATEMENT

A1

New web and ad leads receive an acknowledgement within five minutes.

0

1

2

A2

The source of every new inquiry is recorded.

0

1

2

A3

A specific person or team owns the next action.

0

1

2

A4

Urgent inquiries are separated from routine requests.

0

1

2

A5

The team can see response time and current status.

0

1

2

SECTION A TOTAL

____ / 10



SECTION B

Missed calls and after-hours



⦿ CIRCLE 0, 1, OR 2 FOR EACH STATEMENT

B1

Missed calls receive an immediate text or defined callback process.

0

1

2

B2

After-hours callers are told what will happen next.

0

1

2

B3

The office is notified when a high-intent caller needs attention.

0

1

2

B4

Duplicate calls from the same person are recognized.

0

1

2

B5

The missed-call process is tested regularly.

0

1

2

SECTION B TOTAL

____ / 10



SECTION C

Follow-up and estimates



© CIRCLE 0, 1, OR 2 FOR EACH STATEMENT

C1

Leads receive more than one respectful follow-up attempt.

0

1

2

C2

Follow-up uses more than one channel when appropriate.

0

1

2

C3

Unsold estimates have a defined follow-up schedule.

0

1

2

C4

Interested replies are routed to a salesperson quickly.

0

1

2

C5

Follow-up stops after a reply, opt-out, or disqualification.

0

1

2

SECTION C TOTAL

____ / 10



SECTION D

Booking and no-show prevention



© CIRCLE 0, 1, OR 2 FOR EACH STATEMENT

D1

Customers receive a clear appointment confirmation.

0

1

2

D2

Reminder messages are sent before the appointment.

0

1

2

D3

Customers can easily reschedule or cancel.

0

1

2

D4

The office is notified of confirmations and cancellations.

0

1

2

D5

No-shows are followed up through a defined process.

0

1

2

SECTION D TOTAL

___ / 10



SECTION E

Database reactivation



© CIRCLE 0, 1, OR 2 FOR EACH STATEMENT

E1

Past customers are segmented by service history.

0

1

2

E2

Seasonal maintenance reminders are planned.

0

1

2

E3

Old unclosed leads are reviewed and reactivated.

0

1

2

E4

Campaign replies are handled by a real person quickly.

0

1

2

E5

Results are measured by conversations and booked appointments.

0

1

2

SECTION E TOTAL

____ / 10

RESULTS

Add your five section totals

Use the score to choose the next practical action — not to label the business.

TOTAL SCORE

/ 50

- 0-20

High leakage risk
Start with one urgent leak: missed calls or response speed.
- 21-35

Partly controlled
Standardize follow-up, ownership, and reporting.
- 36-43

Strong foundation
Improve handoffs, estimate recovery, and measurement.
- 44-50

Well systemized
Optimize conversion and test new reactivation opportunities.

YOUR NEXT 30 DAYS

Turn the score into a focused improvement plan

Choose one metric, one workflow, and one owner. Avoid trying to rebuild everything at once.

WEEK
01



Map
Document the current journey from inquiry to booked job.

WEEK
02



Fix
Implement the highest-priority response or follow-up workflow.

WEEK
03



Train
Define who handles replies, exceptions, and escalations.

WEEK
04



Measure
Review response time, conversations, bookings, and lost leads.



ONE METRIC TO WATCH

Booked appointments recovered from leads that would otherwise have been missed or forgotten.

⚡ NEXT STEP

Your score is only useful when it changes the next action.

A personalized review can identify the highest-value place to improve first and the simplest workflow to support it.

GET YOUR PERSONALIZED REVIEW

Message “**SCORE**” for a personalized HVAC lead-recovery review that turns your audit into a focused plan.

➤ Message “**SCORE**” on LinkedIn

to Mahaza Fayyaz