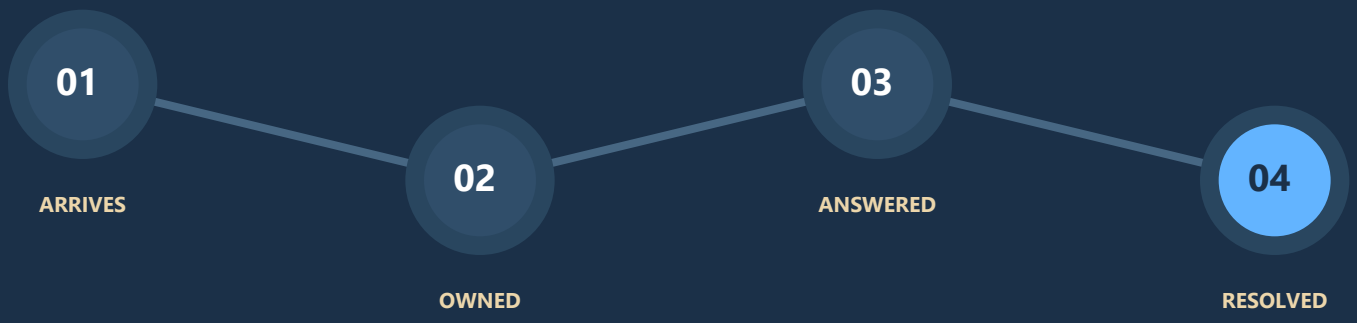
BlūLion

A PRACTICAL GUIDE FOR SERVICE BUSINESSES

Before you buy more leads.

Follow the enquiries you already receive.

Find the gaps. Give each enquiry a next step.
Choose one improvement worth making.



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7 days
Use the records you have

4 checkpoints
Follow arrival to outcome

1 improvement
Fix it, then check again

Includes a printable seven-day worksheet

01 / THE FOUR CHECKPOINTS

Make the next step visible.

One enquiry. Four questions. A clearer picture of what actually happened.

1

Arrives

Where did it come from?

Record the source, arrival time and an internal reference. Keep customer details in your existing system.

2

Owned

Who is responsible?

Name the person who will respond. A notification in a shared inbox is not an assigned owner.

3

Answered

Was the response useful?

Offer a callback, ask a relevant question or give a clear way to book. Check delivery where your system supports it.

4

Resolved

What can you verify?

Record the next stage: booked, attended, won, not proceeding or still unknown. Keep those outcomes separate.

A useful response moves the conversation forward.

“Received” is an acknowledgement. “Can we call at 2?” is a next step.

02 / WALK THROUGH IT YOURSELF

Try it like a customer.

Use your own approved test details. Check which notifications can send before testing a live system.

01

The first enquiry

- [ ] Open the form on your phone.
- [ ] Check that the next step is clear.
- [ ] Confirm someone owns the response.

02

The booking

- [ ] Check date, time and time zone.
- [ ] Find the meeting details easily.
- [ ] Verify a booking actually exists.

03

A change of plan

- [ ] Try rescheduling and cancellation.
- [ ] Look for conflicting instructions.
- [ ] Verify the updated appointment.

04

A reply or missed call

- [ ] Check that a person sees the reply.
- [ ] Check chasing stops when it should.
- [ ] Track callbacks and unknowns.

Three distinctions that keep your numbers honest

SENT

Delivery unverified

LINK CLICKED

Booking unverified

CALL MISSED

Not necessarily lost work

03 / KEEP A SIMPLE RECORD

Your seven-day enquiry check.

Week starting: _____ Review owner: _____

Count events during the week. Use your existing CRM or enquiry log to follow individual records.

DAY	NEW ENQUIRIES	USEFUL RESPONSES	BOOKED	ATTENDED	WON	UNRESOLVED*
1						
2						
3						
4						
5						
6						
7						

*Unresolved is the open count at each day-end. Do not add that column. Bookings and wins can relate to earlier enquiries; daily totals are not a conversion rate.

Follow one enquiry through the four checkpoints

Internal reference: _____ Source: _____

ARRIVED
Date / time

OWNER
Named person

RESPONSE
Useful next step

OUTCOME
Verified / unknown

04 / TURN THE CHECK INTO ACTION

One finding. One next move.

Choose a repeated issue you can address. Give it an owner and recheck the same stages next week.

No clear owner	>	Assign a person to new enquiries and unresolved callbacks.
Booking feels unclear	>	Simplify the next step. Verify the time, place and change options.
Replies go nowhere	>	Give incoming replies a human owner and check the stop rule.
Outcome is unknown	>	Add a simple outcome label. Keep unknowns visible until verified.

Our one improvement:

Owner: _____ Recheck date: _____

Want a useful second opinion?

Request a complimentary BlūLion Growth Review. Bring your findings; a specialist prepares the detailed review for your meeting. No obligation to buy.

Explore your next step > blulion.ca

A small sample is a starting point, not proof of future results.