

Lead Recovery & Follow-Up Protocol

Level 9 Virtual — Internal Operations Document
Owner: Operations | **Status:** Active | **Last Updated:** June 2026
Note: this is the working process our recovery team runs daily, not a training doc. Sharing it as-is so you can see exactly how it operates.

1. Where the Revenue Actually Leaks

Six places almost every business bleeds opportunity. None of them are a lead-volume problem.

- **Missed inbound calls** — an unanswered call is a buyer who chose you and got silence.
- **Unworked new leads** — leads sit in the CRM for hours or days before first contact.
- **No-show appointments** — treated as lost, when they're actually warm leads waiting on a callback.
- **Dead pipeline** — stalled opportunities aging quietly with no one re-working them.
- **Inconsistent follow-up** — cadence depends on who remembers, not a system.
- **No queue owner** — automations fire, but no one is accountable for the outcome.

78%	of buyers go with the vendor who responds first (<i>HBR</i>)
30–40%	of inbound leads are never contacted at all (<i>SMB sales benchmarks</i>)
2x	conversion lift when no-shows get a live callback (<i>speed-to-lead studies</i>)

2. The Operating Principle

This is not a lead problem. It's an execution problem. A CRM stores data — it doesn't work the queue. A sequence fires — it doesn't pick up the phone. A fast text isn't a conversation. Tools and automation support the system; they are not the system.

3. Why Follow-Up Systems Break

- **Over-reliance on automation** — sequences fire, replies sit unread, no human closes the loop.
- **No named queue owner** — leads slip between tools and people.
- **CRM used as storage** — a graveyard of contacts instead of a live daily workflow.
- **No fixed rhythm** — follow-up happens when someone remembers, not on a schedule.

4. The Four Recovery Workflows

Missed-Call Recovery

Trigger: call rings to voicemail, webhook logs it as an opportunity. Action: a human callbacks within minutes — qualifies, handles objections, captures intent live. Outcome: appointment booked or moved into the right nurture stage.

Unworked Lead Re-Engagement

Trigger: any lead untouched past 24 hours surfaces on a daily report. Action: a human triages the list and reaches out — call, then text, then email, same person, full context. Outcome: stage advanced, next step scheduled, notes logged.

No-Show Recovery

Trigger: calendar webhook flags the missed appointment within minutes. Action: a human calls back within the hour while intent is still warm and reschedules live. Outcome: CRM updated, cadence resumes with human checkpoints.

Dead Pipeline Reactivation

Trigger: weekly report pulls every opportunity stalled past threshold. Action: a teammate reviews history, then makes a genuine re-engagement call — not a "just checking in" email. Outcome: re-qualified back into active pipeline, or closed with a real reason.

Capability	AI / Text-Back	Human Recovery
Sends automated text in seconds	✓	
Holds a live conversation		✓
Reads tone, hesitation, intent		✓
Handles objections, reschedules		✓
Owens the daily queue consistently		✓
Updates CRM with context, not just timestamps		✓

5. Daily Ownership Schedule

7:00 AM	Queue review — triage every new lead, missed call, and no-show from the last 24
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	hours.
8:30 AM	Live callback block — two-hour focused dial block, real conversations, in priority order.
11:00 AM	No-show recovery sweep — personal outreach to every missed appointment.
1:30 PM	Pipeline movement — stages updated, notes logged, next steps scheduled.
4:30 PM	Reconciliation & handoff — clean CRM, queue ready for tomorrow.

Weekly: no-show recovery sweeps, dead-pipeline waves, and CRM hygiene run on a fixed schedule. Conversion, speed-to-lead, and recovery metrics are reviewed weekly so the system tightens instead of drifting.

6. Implementation Reality

Running this internally means owning four things every day, not just designing them once:

- **Hiring & training** — finding people who can hold a real conversation and represent the brand on the phone, and keep doing it.
- **Building & maintaining the queue** — daily lists, rules, and escalation paths that evolve with your offers and CRM.
- **Holding the cadence daily** — skipping two days a week quietly kills most of the upside.
- **Reporting & QA** — call reviews and weekly scorecards are what keep quality from silently regressing.

The system is simple to design and hard to run. Cadence, not strategy, is where it usually breaks.

7. What Changes

- Faster speed-to-lead — real human response in minutes, every day.
- Recovered no-shows — rebooked through live conversations instead of disappearing.
- Reactivated pipeline — stalled opportunities worked again on a real cadence.

Bottom line: you don't need more leads. You need someone running the recovery system on the ones you already have.