Follow-Up Visibility Map

A practical worksheet for finding where lead follow-up becomes unclear.

Use this map to make follow-up visible before you add more tools, more reminders, or more pressure on the team. The goal is to see where a lead enters, who owns the next action, what should happen next, and where the path becomes fuzzy.

How To Use This Map

1. Choose one common lead source to review first.
2. Follow that lead from first inquiry through booked conversation, quote, proposal, or close.
3. Write down what actually happens today, not what the process is supposed to be.
4. Circle any place where ownership, timing, status, or next action is unclear.
5. Pick one visibility improvement to test this week.

Keep it honest: If the answer is usually "Lynn remembers" or "someone checks when they have time," write that down. That is not a failure. It is useful system evidence.

Section 1: Lead Entry Points

List the places where a new inquiry, referral, repeat customer request, or interested prospect first appears.

Lead source	Who sees it first?	Where is it recorded?	First response target

Section 2: Ownership And Next Action

Choose up to three recent or typical leads. For each one, identify whether the next action is obvious.

Lead example 1

What happened first?

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Who owns the next action right now?

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What should happen next, and by when?

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Where would the team see this status without asking someone?

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Lead example 2

What happened first?

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Who owns the next action right now?

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What should happen next, and by when?

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Where would the team see this status without asking someone?

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Lead example 3

What happened first?

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Who owns the next action right now?

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What should happen next, and by when?

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Where would the team see this status without asking someone?

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Section 3: Visibility Gap Score

For each statement, score your current follow-up process from 1 to 5.

1 = unclear or inconsistent   3 = partly visible   5 = clear and reliable

Visibility check	Score	Notes
Every lead has a clearly visible owner.	1 2 3 4 5	
The next action is easy to find without asking the owner.	1 2 3 4 5	
Overdue follow-up becomes visible before the opportunity goes cold.	1 2 3 4 5	
The CRM or tracking tool shows relationship status, not just contact details.	1 2 3 4 5	

Handoffs between people or departments are documented and visible.	1 2 3 4 5	
The owner can review open follow-up without searching email or memory.	1 2 3 4 5	

Section 4: Pick One Fix To Test

Do not try to rebuild the whole system at once. Choose one visibility improvement that would reduce confusion quickly.

- Add a required next-action field.
- Assign one visible owner for each lead stage.
- Create an overdue follow-up view.
- Define when a lead moves from new to waiting to stalled.
- Create a weekly review rhythm for open opportunities.

The visibility gap we will fix first:

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The simple change we will test:

____

____

Who owns the change:

____

How we will know it helped:

____

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Ready To Make Follow-Up Easier To See?

If this map shows that your follow-up depends too much on memory, manual chasing, or owner intervention, schedule a Get Ready, Grow conversation. We can help you turn the visible gaps into a cleaner business system.

Schedule here: https://calendly.com/wowsuccessteam/get-ready-grow