The enquiry-to-booking checklist

A practical workbook for Indian businesses that sell through consultations, site visits and appointments.

Find the handover that needs attention.

Before increasing ad spend, check what happens after someone enquires. This guide helps you review ownership, reply speed, follow-up and booking with your team.

Bring your last 20 enquiries.

Use one recent period and include every enquiry in it. Work in your own CRM or a private sheet. Record the source, arrival time, first useful reply, owner, next action and booking outcome. Keep personal details in your own secure systems.

What you will leave with

A ten-point checklist, four useful measures, a follow-up worksheet and a seven-day action plan. Choose one gap to fix first; review the result before changing more.

Designed for enquiry-led businesses

Aesthetic and dermatology clinics: consultation handling. Developers: site-visit coordination. Interior studios: discovery calls and project follow-up. Adapt the workflow to your business and approved communication practices.

A self-review tool, not a prediction of results. Examples describe workflows, not Reachwise client outcomes.

Check the journey, end to end.

Mark each item Yes, No or Unknown. An unknown is a question to investigate, not evidence of a leak.

Identify

Can we trace each enquiry to a source?

Yes [ ] No [ ] Unknown [ ]

Have we agreed what makes an enquiry qualified?

Yes [ ] No [ ] Unknown [ ]

Reach

Does the ad match the offer on the landing page?

Yes [ ] No [ ] Unknown [ ]

Is the next step clear on a phone?

Yes [ ] No [ ] Unknown [ ]

Engage

Is a named person responsible for every enquiry?

Yes [ ] No [ ] Unknown [ ]

Do after-hours enquiries receive clear next steps?

Yes [ ] No [ ] Unknown [ ]

Convert

Does every open enquiry have a next action and date?

Yes [ ] No [ ] Unknown [ ]

Can we distinguish booked, attended and closed outcomes?

Yes [ ] No [ ] Unknown [ ]

Retain

Do we record permission and honour opt-outs?

Yes [ ] No [ ] Unknown [ ]

Is there an appropriate rebooking or follow-up process?

Yes [ ] No [ ] Unknown [ ]

Tracking note: a Pixel absent from page HTML may load through Tag Manager or after consent. Verify actual events in authorised tools before concluding tracking is absent.

Measure bookings, not just leads.

Use a consistent date range, remove duplicates and define each status before comparing results.

First useful response time

First useful reply time minus enquiry arrival time. Track automated acknowledgement separately from a reply that answers the question or moves the enquiry forward. Review median time and the slowest cases; split business hours from after hours.

Enquiry-to-booking rate

Unique enquiries that booked / unique enquiries received x 100. Use the same enquiry cohort and allow time for later bookings. Keep attended visits and completed sales as separate measures.

Cost per booked lead

Ad spend attributable to the cohort / unique booked leads from that cohort. State which costs you include. If no bookings occurred, report "no bookings" instead of dividing by zero.

Follow-up coverage

Open enquiries with a named owner and a dated next action / all open enquiries x 100. This measures process coverage, not sales quality.

Worked example: illustrative only

Suppose 20 enquiries from one campaign produce 4 bookings after INR 8,000 of ad spend. The booking rate is 20%; ad cost per booked lead is INR 2,000. These are arithmetic examples, not benchmarks or client results.

Your period: _____ Review date: _____

Give every enquiry a next step.

Use this worksheet in your own CRM. Agree response targets your team can actually meet.

When an enquiry arrives

Record the channel and timestamp. Assign one owner. Acknowledge receipt and give an accurate reply window. Do not label an automated acknowledgement as a completed conversation.

When the person replies

Clarify what they need, explain the next step and offer a relevant appointment or call. For clinics, keep medical questions with authorised clinical staff; avoid collecting sensitive medical information in a general marketing form.

When a booking is made

Confirm the date, location or link and a simple rescheduling route. Record booked and attended separately. Send reminders only through appropriate, permitted channels.

When there is no reply

Agree a limited follow-up schedule and a stop rule. Use the channels the person permitted. Honour opt-outs promptly; do not add scraped numbers to WhatsApp campaigns.

Owner: _____ Backup: _____

Reply target: _____ After-hours plan: _____

Next action: _____ Due date: _____

Stop rule / opt-out handling: _____

Your next seven days.

Keep the first change small enough to run, measure and improve.

Days 1-2: establish the baseline

Review your last 20 enquiries. Complete the checklist and calculate the measures you can support. Mark missing information explicitly.

Days 3-4: repair one handover

Choose the clearest gap. Assign an owner and a backup, set a realistic reply window and give every open enquiry a dated next action.

Days 5-7: check the process

Review new enquiries daily. Confirm the process is being followed and log exceptions. Do not infer a sales improvement from a small or incomplete sample.

Keep the review going

Compare equivalent periods and record changes in spend, targeting, offer and seasonality. Longer decision cycles need longer observation windows.

Want a second pair of eyes?

Request a free Reachwise Scan to review where enquiries may be slipping away. For businesses running ads or ready to start. No obligation.

getreachwise.com/scan

Prepared by Reachwise, November 2026. Based on the Reachwise five-stage system and internal India research. This workbook makes no market-wide statistical or legal claims. Confirm applicable industry rules with qualified advisers before launching campaigns.