Harborline
LEAD RECOVERY

SAMPLE LEAD LEAK AUDIT

Three practical fixes to protect more of the leads you already paid to attract.

Prepared for Seabright Home Services | *Fictional example*

01	02	03
Missed-call recovery	**Web-inquiry follow-up**	**Estimate reactivation**

Why this sample exists

This document shows the structure and level of specificity a real Harborline audit can provide. The company, observations, and numbers are illustrative. A real audit replaces assumptions with the client's actual customer journey, lead volume, average job value, and systems.

Prepared by Harborline Lead Recovery

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EXECUTIVE SUMMARY

The first three gaps Harborline would fix

Seabright Home Services appears to have a healthy flow of incoming calls and website inquiries, but the sample customer journey leaves too much responsibility on the prospect to call again, wait for a reply, or remember an estimate. The fastest path to improvement is not more advertising. It is a clearer next step for the leads already arriving.

3	7-10 days	20-40 min
priority gaps	to launch core workflow	estimated owner onboarding

#	Opportunity	Priority	Recommended order
1	Missed calls receive no immediate recovery path	High	Launch first
2	Web inquiries rely on a single acknowledgment	High	Launch second
3	Unbooked estimates lack a structured re-engagement sequence	Medium-high	Launch third

What a real audit reviews

Public contact paths, missed-call handling, website response, estimate follow-up, past-customer reactivation, review requests, and the client's current tools.

What this sample does not claim

It does not claim access to Seabright's CRM, call logs, close rates, or revenue. Every number below is clearly marked as an illustration until verified with the client.

Audit standard

- Prioritize fixes that can be launched quickly and measured clearly.
- Use respectful, permission-aware follow-up instead of aggressive message volume.
- Keep the client's workload low: one short onboarding questionnaire, message approval, and access to the agreed tools.
- Report contacts, replies, appointments, and estimated revenue influence in plain English.

1	Missed calls have no immediate recovery path	HIGH PRIORITY

In the sample journey, a caller who reaches voicemail must decide whether to leave a message, wait, or call another provider. For urgent home-service needs, that is a fragile handoff.

Current path	Recommended path
Customer calls -> no answer -> voicemail -> customer chooses whether to wait or contact a competitor.	Customer calls -> no answer -> immediate text -> clear reply or booking option -> staff alert -> human follow-up.

Recommended workflow

Within 60 seconds	Send a brief text acknowledging the missed call and asking what the customer needs.
Immediately	Create or update the lead record and alert the appropriate staff member.
After 10-15 minutes	If there is no reply, send one useful follow-up with a booking or callback option.
On reply	Stop automation and hand the conversation to a person.

Sample first message

“Hi, this is Seabright Home Services. Sorry we missed your call. What can we help with today? Reply here, or choose a callback time at [link]. Reply STOP to opt out.”

Why this is worth testing

- It reaches the prospect while the need is still fresh.
- It gives a low-friction option to reply without calling again.
- It creates a measurable path from missed call to conversation and appointment.

Track: missed calls captured, text replies generated, appointments booked, and first-response time.

2	Website inquiries receive too little follow-up	HIGH PRIORITY

A confirmation page proves the form was submitted, but it does not keep the prospect moving. The customer still needs to know when someone will respond, what happens next, and how to continue immediately.

Current path	Recommended path
Form submitted -> generic confirmation -> inbox notification -> response depends on staff availability.	Form submitted -> immediate acknowledgment -> service-specific routing -> staff task -> timed follow-up if no conversation begins.

Recommended workflow

- Confirm receipt immediately and state a realistic response window.
- Route the inquiry by service, location, urgency, or project type.
- Create a staff task with the prospect’s original message visible.
- Send a helpful follow-up later the same business day if no contact occurs.
- Send one final next-business-day reminder, then stop unless the lead engages.

Sample acknowledgment

“Thanks for contacting Seabright Home Services. We received your request and a team member will review it within one business hour. If this is urgent, call [number]. You can add details by replying to this message.”

Client-friendly design

What the client approves	What Harborline handles
Response window, message wording, service categories, booking link, and escalation rules.	Workflow setup, testing, message timing, basic monitoring, and a plain-English report of activity.

Track: forms received, first-response time, replies generated, and booked calls created.

3	Unbooked estimates are not systematically re-engaged	MEDIUM-HIGH

Many prospects need time to compare options, discuss the project, or wait for scheduling. Silence after an estimate does not always mean “no.” A short, respectful sequence can surface questions and recover opportunities without pressuring the customer.

Recommended three-touch sequence

24 hours	3 days	7 days
Confirm the estimate arrived and invite questions.	Offer one useful clarification: timing, scope, payment options, or next available date.	Close the loop politely and make it easy to restart the conversation later.

Sample follow-up

“Hi [Name], I wanted to make sure the estimate reached you. Is there anything you would like us to clarify about the scope, timing, or next steps? No pressure - I’m happy to answer questions.”

Stop rules

- Stop immediately when the prospect replies, declines, or opts out.
- Do not continue after a staff member marks the opportunity closed.
- Do not use the same cadence for emergencies, maintenance, and large projects without review.

Optional phase two opportunities

Past-customer reactivation	Review requests
Seasonal reminders, maintenance outreach, and service-specific check-ins for customers who have already worked with the business.	A short request sent after a completed job, with a direct link and a simple process for unhappy customers to contact the business privately.

Why this comes third

Missed calls and new inquiries are more urgent. Estimate follow-up should be added after the business can reliably respond to the conversations created by the first two workflows.

ILLUSTRATIVE VALUE MODEL

The system only needs to recover a small number of jobs to justify testing

A real audit uses the client's own lead volume, close rate, and average job value. The scenario below is deliberately modest and is not a forecast.

Illustrative input	Assumption
Missed or unbooked opportunities per month	**12**
Prospects who reply to structured follow-up	**30%**
Replying prospects who become customers	**30%**
Illustrative average job revenue	**$650**

Illustrative calculation

12 opportunities x 30% response x 30% close x $650 average job = approximately $702 in gross monthly revenue influenced. This is a sensitivity example, not a promise of results.

Break-even perspective

$198	$298	$149
founding first month	normal first month	normal monthly management

At a $650 average job value, one recovered job would exceed the normal first-month fee by $352 and equal about 4.4 months of the $149 monthly management fee. Profitability still depends on margin, capacity, software costs, and lead quality.

Scenario	Opps.	Reply	Close	Avg. job	Gross influenced
Low sensitivity	8	20%	25%	$500	**$200**
Illustrative base	12	30%	30%	$650	**$702**
Higher-volume sensitivity	18	35%	35%	$900	**$1,985**

IMPLEMENTATION

A low-friction 30-day launch plan

The process is designed to require as little owner time as reasonably possible while preserving approval and control.

Day 1	**Short onboarding**	Complete one questionnaire, confirm the priority workflow, and identify the tools already in use.
Days 2-4	**Build and approve**	Harborline drafts the messages, timing, stop rules, and staff handoff for approval.
Days 5-7	**Connect and test**	Harborline configures the approved workflow, tests each handoff, and documents the fallback process.
Days 8-30	**Monitor and improve**	Harborline reviews activity, flags issues, and sends a concise monthly summary with the next recommendation.

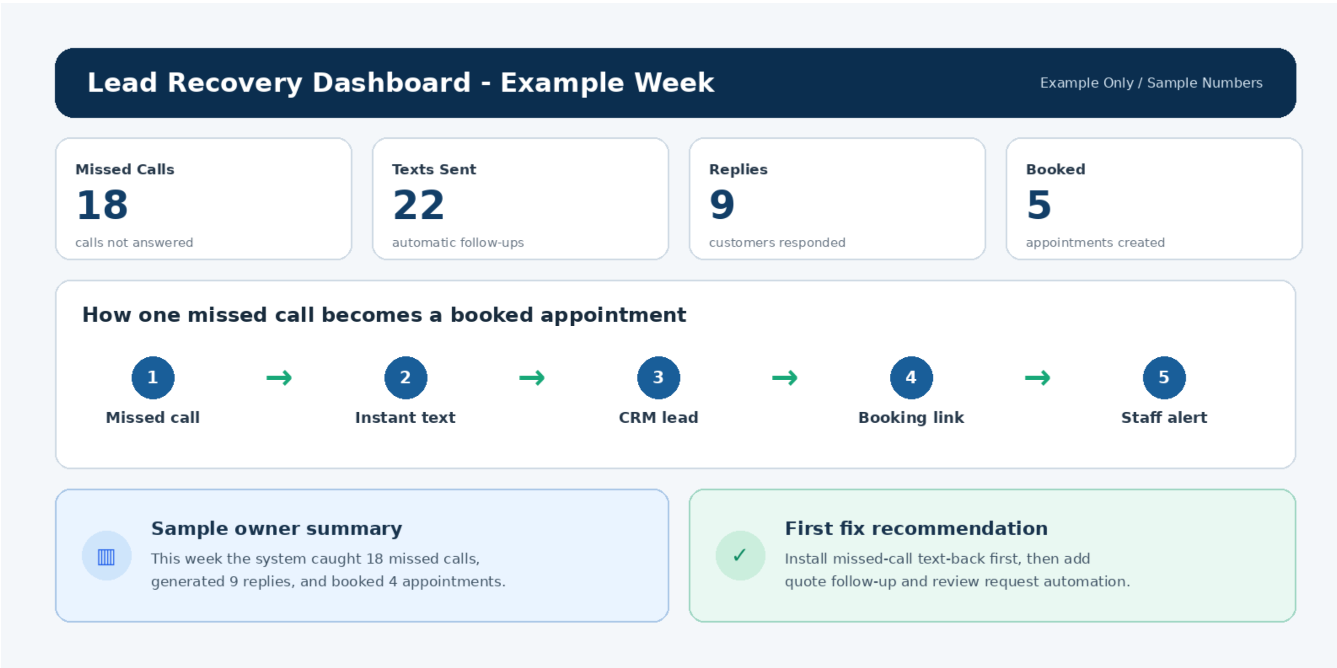
Client responsibilities

Approve wording, provide agreed access, keep service details accurate, and respond to qualified prospects.

Harborline responsibilities

Configure and test the workflow, monitor the agreed scope, report measured activity, and recommend the next practical improvement.

What the client sees



Sample reporting layout. All numbers shown are illustrative.

Reporting principle

The report should answer four questions in plain English: What came in? What did the system do? What did customers do next? What should we improve next month?

RECOMMENDED STARTING SCOPE

Founding Client Pilot

A limited introductory offer for the first three businesses that want Harborline to build and manage a focused lead-recovery workflow.

SETUP	MANAGEMENT
$99	**$99**
one-time	per month for 60 days

Pilot includes

- One-location core lead-recovery setup focused on missed calls or website inquiries.
- One approved follow-up sequence with timing and stop rules.
- Basic activity tracking, monitoring, and a plain-English monthly report.
- Human support and a month-to-month arrangement with no long contract.
- After 60 days, continuing service becomes $149/month with no second setup fee.

Quoted separately only when needed

- Third-party software, phone, texting, or usage fees.
- Multiple locations, complex CRM migrations, custom development, or unusually high message volume.
- Advertising management, full website redesign, or services outside the approved lead-recovery scope.

Why choose Harborline

Most software gives the client another dashboard to learn. Harborline is designed for owners who want the system configured, tested, monitored, and explained for them - with simple pricing, human support, and no inflated agency retainer.

Next step

Request a real written Lead Leak Audit. No sales call is required.

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