Lead Revival Checklist
Your step-by-step playbook for turning cold social leads into booked appointments—all for one flat, predictable fee.

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1. Real-Time Lead Alerts

- Integrate your web and social lead forms with instant notifications (via CRM webhook, Zapier, or native integration)
- Assign BDC agents to monitor alerts 24/7 (or business hours)

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2. Rapid Human Follow-Up

- Script a personalized opening line referencing the lead's interest (e.g., model, trim)
- Call each new lead within 5–10 minutes of form submission
- Log call outcomes immediately in your CRM (Connected, Left VM, No Answer)

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3. Multi-Channel Touchpoint Sequence

- **SMS** – Send within 5–10 minutes if call goes unanswered
- **Email** – Follow up 30–60 minutes later with additional details and brochure link
- **Ringless Voicemail** – Drop RVM 2–4 hours after SMS/email if still no reply
- **Task Escalation** – Create a follow-up task for any lead silent after full sequence

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4. Personalization Setup

- Capture key lead data fields: First Name, Vehicle Interest, Budget, Trade-In Status
- Build dynamic templates for SMS and email that auto-populate these fields
- Segment leads by high-intent attributes for tailored CTAs

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5. Optimal Timing Configuration

- Analyze past response data to determine your dealership’s peak windows
  - SMS: Tue–Thu, 10 AM–12 PM & 4 PM–6 PM
  - Email: Tue–Fri, 8 AM–10 AM & 1 PM–3 PM
  - RVM: Mon–Thu, 2 PM–4 PM
- Configure your automation or CRM to send within these timeframes only

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6. CRM Integration & Reporting

- Set up real-time data push from your lead forms into your CRM
- Auto-log every call, SMS, email send, and RVM delivery
- Create dashboard reports to track:
  - Total leads contacted
  - Channels used & response rates
  - Revival rate (contacts → appointments)
- Review weekly and refine scripts, templates, and timing based on performance