

LEAD GENERATION PLAYBOOK

Lead follow-up Playbook

Speed to first contact is the most reliable predictor of whether an enquiry converts, and it is the thing almost nobody does well — because doing it manually means someone waiting by a screen at all hours.

At a glance	
Trigger	Form, ad or CRM lead created
Goal	Contact and qualify immediately
Primary KPI	Speed to first contact
Messages	3–5, conversational
Setup time	Under 30 minutes

What is automated lead follow-up on WhatsApp?

Automated WhatsApp lead follow-up sends a first reply within seconds of an enquiry, asks a short set of qualifying questions, and routes the answers. Sales-ready leads reach a person or a calendar; the rest enter a nurture path. The lead never waits for office hours.

Key takeaways

- The first reply does not need to be human. It needs to be immediate and useful.
- Two or three qualifying questions is the ceiling — this is a conversation, not a form.
- Route on the answers, not on lead volume.
- Measure speed to first contact separately from contact rate.

Why this leaks revenue today

1. Leads arrive outside office hours

Enquiries do not follow your roster. The ones submitted on a Friday evening are often the most motivated and the most likely to be lost.

2. Batching kills the moment

Working through the enquiry list at 4pm means competitors have already replied to half of it.

3. Your team spends the day on unqualified leads

Without a qualifying step, the good enquiries and the tyre-kickers get the same expensive attention.

Entry conditions

The journey only starts when all of these are true. Entry conditions matter more than message copy — most underperforming journeys are mistargeted, not badly written.

- Web form submitted
- Click-to-WhatsApp ad
- CRM lead created
- Missed call or enquiry line

What has to be connected

Lead fields	Source, service or product interest, location, budget where given
Routing rules	Which team, territory or calendar each qualified lead belongs to
Availability	Calendar slots if the journey books directly
Consent	Explicit permission to contact on WhatsApp, captured at the form

The journey

Lead created → Send within 60 seconds → Ask 2 qualifying questions → Score the answers

Then it branches on what the customer does:

Qualified and ready	Book into the calendar or hand to sales
Interested, not ready	Enter a lighter nurture sequence
Not a fit	Close politely and stop

Goal: Meeting booked or qualified handoff — journey stops

A journey without a stop condition is a journey that gets your number blocked. Set the goal event before you write a single message.

The messages

Starting points, not scripts. Rewrite them in your own voice — and note the reasoning, because that is what transfers to your catalogue.

Within 60 seconds

Thanks for getting in touch about {service}. So I can point you the right way — is this for {option A} or {option B}?

Why: Acknowledges instantly and asks one question. Speed matters more than polish here.

On reply

Got it. And roughly when are you looking to move on this?

Why: Timing is the single most useful qualifier. It separates a live opportunity from a browser.

On qualification

Perfect. {Name} handles exactly this — here are two times that work: {slots}

Why: Names a person and offers specific slots. Open-ended 'when suits you' loses momentum.

What it looks like to the customer

Thanks for enquiring about the Richmond apartment. Are you looking to buy or rent?

Buy

Great. Roughly when are you hoping to move?

Next couple of months

That works well with the settlement timeline. Sarah runs the inspections — Saturday 10am or Sunday 2pm?

Illustrative conversation. Not a customer transcript.

What to measure

Metric	Definition
Speed to first contact	Time from enquiry to first message. The one metric worth reporting weekly.
Contact rate	Enquiries that produce a real reply from the customer.
Qualification rate	Enquiries that reach a defined qualified state.
Booked appointments	Meetings, inspections or calls created by the journey.

Keeping the numbers honest. Agree the attribution window before launch. Report direct and influenced conversions separately. Where volume allows, hold out a control group. Do not claim every order that happens after a message.

Set it up

1. Connect your form or CRM

Every lead source must post into ConvoHut, including paid ad lead forms.

2. Capture WhatsApp consent

Add an explicit opt-in at the form. Without it the journey cannot run.

3. Write two qualifying questions

Not five. Choose the two that actually change what happens next.

4. Set the routing rules

Define what qualified means, and where those leads go.

5. Test end to end

Submit a real enquiry yourself and time the reply before you go live.

Then tune it

Cut a question before you add one

Every extra qualifier costs completion. Three is usually one too many.

Always ask about timing

Across lead-driven businesses it separates live opportunities faster than budget does.

Watch the handoff, not just the reply

Fast automated replies are worthless if a qualified lead then waits two days for a human.

Questions this raises

Should the first reply be automated or human?

Automated. A useful reply in sixty seconds beats a perfect reply in six hours, and the customer cannot tell the difference at that stage of the conversation.

How many qualifying questions should I ask?

Two or three. This is a conversation, not a form. Ask only what changes the routing decision.

What happens when someone asks something the AI cannot answer?

It escalates. The AI operates inside approved knowledge only, and hands off to your team with the full thread and context intact.

Can it book directly into a calendar?

Booking is part of the journey design. Confirm current calendar integration status before you promise it to a client.

Does this replace my sales team?

No. It replaces the waiting. Your team gets the same leads, qualified, with the context already gathered.

What about compliance in regulated industries?

Consent, record-keeping and message content all need review against your obligations before launch. Bring your compliance requirements to the pilot scoping call.

Want this built with you?

ConvoHut is working with a small group of early access customers. We configure the first journey together, review it weekly, and agree the success metric before anything goes live. convohut.com/early-access

ConvoHut is pre-launch. This playbook contains no customer results, and any interface figures shown on our website are sample data. Version 1.0, August 2026.