



✓ Group Opportunity / Lead Management Checklist

■ 1. New Opportunity / Lead Received

- Log opportunity in **CRM** with full details (contact, company, type of enquiry)
 - Complete **Touchpoint #1** on **same business day**:
 - 📞 Call the contact
 - ✉️ Send follow-up email
 - Log both the call and email in the **CRM opportunity timeline**
 - 🔔 **Create task reminder** in CRM to follow up (Touchpoint #2)
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■ 2. Follow-Up Touchpoints (Required Before Disqualification)

🔄 Touchpoint #2

(2–3 days after Touchpoint #1)

- 📞 Make second call
- ✉️ Send second follow-up email
- Log both in CRM opportunity timeline
- 🔔 **Create task reminder** for final follow-up (Touchpoint #3)

🔄 Touchpoint #3

(2–3 days after Touchpoint #2)

- 📞 Make third and final follow-up call
- ✉️ Send final follow-up email
- Log both in CRM opportunity timeline



■ 3. Disqualify / Mark Opportunity as Lost (If No Response)

- Update opportunity status to **"Lost" or "Disqualified"** in CRM
- Record **reason for disqualification** in opportunity notes
- + **Assign a task to the Sales Team** for follow-up call and feedback
- 🛎 **Set task reminder** for future re-engagement, if appropriate

🧠 Key Rules & Reminders

- 📞 **Each touchpoint = 1 call + 1 email**
- ⌚ **3 total touchpoints** before disqualifying
- 📌 **Log all communication** in the CRM opportunity timeline
- 🛎 **Create a task reminder** after every interaction to ensure no follow-up is missed
- 💬 Sales follow-up task is **mandatory** after a lost opportunity