THE 5 STAGES TO CONVERT A LEAD

AS SIMPLE AS COUNTING ON YOUR FINGERS

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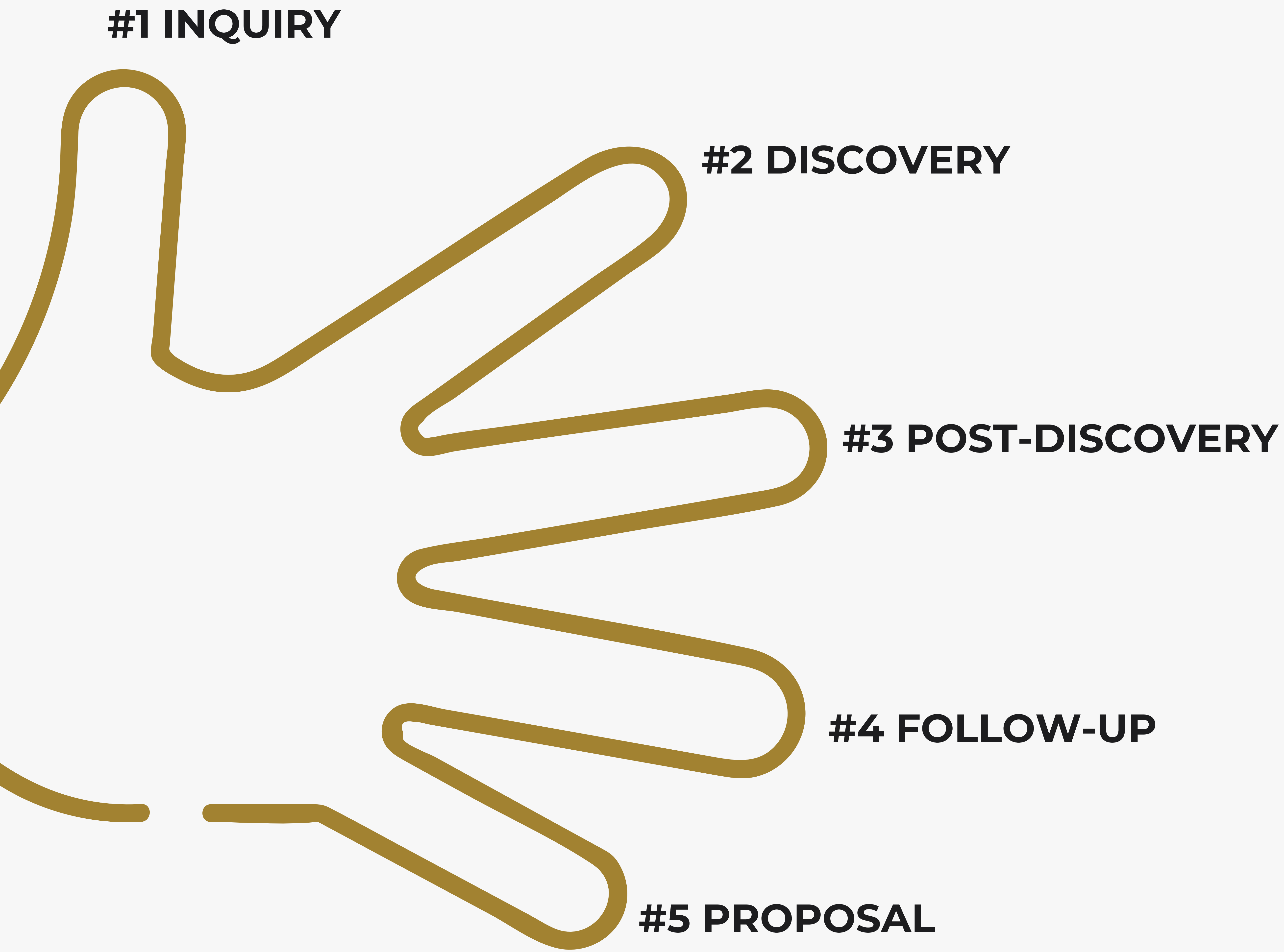
INTRODUCTION

Most businesses don’t lose sales because they lack leads—they lose them because leads fall through the cracks. Missed follow-ups, forgotten calls, and delayed proposals are the culprits. Every lost lead equals lost revenue.

To fix this, we've created 5 simple stages to help you convert more leads. These five stages are as easy to remember as the five fingers on your hand. Get this right, and you'll improve your close rate, boost your pipeline, and drive more revenue.



5 STAGES

These five stages are the difference between chasing leads and consistently converting them.

This is a structure. But it only works if you have a system to move leads forward.

Let's see how each stage works in practice — and how it keeps every lead moving forward.

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STAGE 1: INQUIRY

Follow these steps with every lead:

- Every inquiry is acknowledged immediately, whether it is from your website or a network connection.
- The lead is invited to book a discovery call via email.
- If they don't book, send follow-up communications to keep you top of mind.

Result: Leads feel seen right away, and fewer slip away.

STAGE 2: DISCOVERY

Once a discovery call is booked:

- The calendar confirms the appointment with the attendee and the organizer.
- Reminders ensure both you and the lead show up prepared.
- After the call, you select whether they are:
    - **Potential client** → continues in the main pipeline
    - **Referral partner** → moved into a separate referral partner pipeline
    - **Not a fit** → receives a thank-you email and is removed from all pipelines

Result: A more targeted approach. Not only do you gain more defined leads, but you also begin building a referral partner program — creating new revenue opportunities you didn't have before.

STAGE 3:
POST-DISCOVERY

After the first call, most businesses drop the ball. But here is how to keep the momentum alive:

- Automatic follow-ups to book the next call.
- Gentle nudges if the lead delays.

Result: More prospects move forward instead of going silent.

STAGE 4:
FOLLOW-UP

The follow-up call is where decisions happen.

- Confirmations and reminders are handled automatically.
- You can record the proposed plan (or mark “Not interested”).
- Leads are seamlessly moved to the right next step.

Result: More proposals get discussed, fewer opportunities stall.

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STAGE 5: PROPOSAL & NEXT STEPS

When a proposal is ready:

- Send it out immediately.
- Automatic reminders ensure it doesn't get buried.
- If there's no response, the lead is marked as "Not Interested Now" so your pipeline stays clean.

Result: More proposals are reviewed, decisions happen faster, and your close rate improves.

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THE OVERWHELM MOMENT

By now, you might be thinking:

"This sounds great, but... emails, calendars, proposals, payments, custom fields — this is a lot."

And you'd be right. To make the system run smoothly, you'd need:

- Email templates and automated sequences
- Calendars and scheduling links
- Proposal docs and delivery tools
- Payment processor integration
- Custom fields and dropdowns
- Additional pipelines for partners and "not now" leads

That's a lot of moving parts. A great way to create and organize these actions is to invest in a CRM. However, CRMs come with their own challenges. This is where Goals To Results can assist you...

THE GTR DIFFERENCE

At **Goals To Results**, we build you a system within a CRM where all your business activities take place. This includes making sure:

- Every lead gets followed up on.
- More prospects make it to the final call.
- Your close rate improves.

We don’t just build the pipeline. We build the connections between your website, calendars, lead pages, and CRM — so the whole system works together seamlessly.

We also set up your email outreach system properly, giving you the best chance to land in inboxes instead of spam.

We’ve implemented systems for businesses in industries ranging from professional services to trades, and the result is always the same: less chaos, more revenue.

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READY FOR MORE WINS?

Imagine every inquiry being followed up automatically, every discovery call showing up on your calendar, and more proposals turning into closed deals.

👉 Book your 20-minute strategy call and let's find out what systems would benefit your business.

BOOK A CALL TODAY

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