

# Lead follow-up worksheet

## For fitness businesses

Convert more leads into loyal members with faster, smarter follow-up.

### What you'll get from this worksheet

Use this worksheet to evaluate and improve your lead follow-up process so you can convert more prospects into members. You'll gain:

- A clear picture of what's working and what's not
- A proven framework for fast, personalized outreach
- Action steps to boost response and conversion rates

### Key success benchmarks

Use these metrics as your gold standard:

- **First response time:**  $\leq 5$  minutes
- **Value delivered:** Within 24 hours of lead inquiry
- **Call-to-action (CTA):** One clear, singular CTA per message
- **Personalized offer:** Tailored to the lead's goals, interests, or fitness level

Let's dive in—start your follow-up audit on the next page.



## Start

### New lead info

Name: .....

Email: .....

Phone: .....

Date & time of outreach:  
.....

### First touch point

Time elapsed: .....

Contact type (*circle one*):

Text Email Call

In-person Social media

Connected? Yes No

### Call to action

Description of CTA: .....

Action taken? Yes No

Additional touch points required  
before action: .....

### Value delivery

How you helped: .....

When you helped: .....

Response? Yes No

### Personalization

Private demo? Yes No

Goals identified? Yes No

Qualified lead? Yes No

### Goals

Goal 1: .....

Goal 2: .....

Goal 3: .....

### Conversion?

**Yes** → Success! Kick off your onboarding and engagement process to set the stage for long-term success with your new member.

**No** → Enroll viable leads into a targeted nurture sequence to educate, build trust, and move them closer to joining.

## End

# Turn your follow-up into membership growth

**Ready to put this into action without doing it manually?**

Zen Planner helps fitness businesses like yours:

- Automate lead follow-up workflows
- Deliver personalized emails and texts in real-time
- Track conversions and lead engagement all in one place

**Want to see how it works?**

Scan the QR code to book a free demo and explore how Zen Planner can help you convert more leads into loyal members.

