

CHAPTER 6 / GROW

Lead Generation, Ads and Recruiting Playbook

Build campaigns that create qualified opportunities, route every lead into the CRM, follow up fast, and measure quality through sale and retention - not cheap form fills.

75% CRM execution	25% growth support
Workflow, data, follow-up, reporting and adoption.	Ads, recruiting, AI, training and templates.

Outcome

This chapter shows how to create demand without disconnecting marketing from the CRM. The objective is not the cheapest lead. The objective is a predictable flow of qualified conversations that the team can contact, advance, close, and retain profitably.

Conquest remains the center: every source has a naming rule, every new record receives an owner, every contact attempt is recorded, every opportunity has a next action, and every campaign is judged using downstream CRM outcomes. Ads, recruiting and templates support that operating system; they do not replace it.

Never launch a campaign until ownership, response time, lead capacity, tracking, privacy notice, required licensing, and approval are confirmed.

1. Start with capacity, not the ad platform

More leads make a weak process fail faster. Before spending, calculate how many new records the team can work properly.

Lead capacity formula

Weekly lead capacity =
active agents x workable new leads per agent per day x working days

Example for planning only:
8 agents x 5 new leads x 5 days = 200 new leads per week

Use your own workload data. A workable lead includes the first attempt, required follow-up attempts, notes, qualification, next action, and a final disposition. If the team cannot complete those actions, reduce volume or add capacity.

Define the commercial target

Work backward from profitable customers.

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Required sales = target incremental contribution / contribution per retained sale
Required qualified conversations = required sales / close rate from qualified
conversation
Required leads = required qualified conversations / lead-to-qualified rate
Allowable cost per lead = allowable acquisition cost / leads required per sale
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Use contribution after delivery, cancellation, refund, chargeback, servicing, and commission costs. Do not use top-line revenue as if it were profit.

Choose one audience and one offer

The first campaign should answer:

- Who is the exact person or business?
- What observable situation makes the offer relevant now?
- What useful next step are you offering?
- What proof can be supported?
- What action should the person take?
- What happens in the first five minutes after submission?

Do not combine customer acquisition, recruiting, referrals, and brand awareness in one campaign. Give each funnel its own goal, form, CRM source, owner, and reporting view.

2. Compliance and approval gate

Insurance and financial-services advertising may require licensing, disclosures, advertiser verification, approved wording, privacy notices, consent records, and restrictions that vary by product and target location. This playbook is operational guidance, not legal advice.

Before launch, obtain approval for:

- Advertiser identity, legal entity, domain, page, and billing account.
- Products, target locations, eligibility and licensing.
- Every claim, price, saving, result, comparison, testimonial, and deadline.
- Landing page, form fields, privacy notice, consent wording, cookie or tracking setup.
- Follow-up channels, frequency, call recording, message templates, and suppression rules.
- Data transfer from ad platform to CRM and any onward processing.
- Retention, deletion, access, export, and breach-escalation procedure.

As of September 2026, Google says financial-services verification can apply to insurance advertisers and introduced additional requirements across EEA markets including Slovenia. Check the current in-account notice and target-country policy before spending: Google financial-services verification update (<https://support.google.com/adspolicy/answer/17127726?hl=en>).

For EU personal data, define a valid legal basis and provide required information at collection. If relying on consent, it must be specific and given through a positive action: European Commission - legal grounds for

processing data (https://commission.europa.eu/law/law-topic/data-protection/information-business-and-organisations/legal-grounds-processing-data_en).

3. Build the measurement architecture

Use one source naming convention

Recommended structure:

CHANNEL | CAMPAIGN | AUDIENCE | OFFER | CREATIVE | DATE

Example:

META | LIFE-CHECKUP-Q4 | PARENTS-35-54 | REVIEW-CALL | TESTIMONIAL-A | 2026-09

The CRM record should store at least channel, source, campaign, creative or ad ID where available, received time, owner, first-attempt time, qualification, meeting, outcome, value, and loss reason.

Define funnel events before launch

Event	Definition	CRM field or status	Owner
Lead received	Valid submission arrives	New	Routing owner
First attempt	First permitted outreach starts	Activity timestamp	Assigned user
Connected	Two-way conversation	Connected	Assigned user
Qualified	Agreed criteria met	Qualified	Agent
Appointment	Dated event booked	Appointment date	Agent
Sale	Accepted and documented	Won	Agent
Retained sale	Passed defined quality period	Retained status	Manager

Optimize campaigns toward the deepest event with enough reliable volume. If retained-sale data is too sparse, use qualified lead or appointment while continuing to report sales and retention.

Route leads into Conquest

Choose the safest supported method in this order:

- 1 Tested direct integration or webhook supported by both systems.
- 2 Approved integration platform with field mapping, logs, retries, and access controls.
- 3 Scheduled secure import with an owner and reconciliation.
- 4 Manual import only as a documented temporary process.

Test with demo records. Confirm field mapping, duplicate rules, source naming, owner assignment, timestamps, consent evidence, failed-record alerts, and deletion behavior. Never claim an integration exists until it has been tested in the production configuration.

Close the loop

Platform lead counts alone cannot tell you quality. At minimum, report cost per connected lead, cost per qualified conversation, cost per appointment, cost per sale, and retained contribution by source.

Google's current enhanced conversions for leads documentation explains using hashed first-party lead data with offline outcomes and recommends Data Manager for current implementations: Google enhanced conversions for leads (<https://support.google.com/google-ads/answer/11021502?hl=en>). Use it only after privacy and technical approval.

Meta's official lead-generation setup guide recommends CRM lead retrieval and sending downstream lead-quality signals through Conversions API when appropriate: Meta lead generation campaign guide (<https://about.fb.com/ltam/wp-content/uploads/sites/14/2023/11/LeadGenerationGuide.pdf>).

4. Build a landing page that qualifies

A strong landing page continues the ad's promise. It should not introduce an unrelated offer.

Recommended structure:

- 1 Specific headline for the audience and situation.
- 2 Short explanation of the useful next step.
- 3 Three to five outcomes or topics covered.
- 4 Who the offer is and is not for.
- 5 Credible proof that can be verified.
- 6 Short form asking only what is necessary.
- 7 Privacy information and required disclosures.
- 8 Clear submission button.
- 9 Confirmation page stating exactly what happens next.

Form design

Ask fewer questions when speed matters, but add qualifying questions when the team is wasting time on poor-fit records. Avoid collecting sensitive information unless necessary, approved, and securely handled.

Useful starting fields:

- Name.
- Approved contact method.
- Location or service area when necessary.
- Best time to contact.
- One or two eligibility or intent questions.
- Communication preference or consent where required.

Never ask a consumer to submit medical history, financial account information, passwords, government identifiers, or detailed policy data through a generic ad form.

Confirmation page

Tell the person:

- Submission was received.

- Who will contact them.
- Expected response window.
- What number or sender to expect where appropriate.
- What to prepare.
- How to withdraw or contact the organization.

The confirmation page should also trigger the correct approved tracking event.

5. Meta lead campaign - practical setup

Platform labels change, so use the current account interface and policy prompts. The stable structure is campaign, ad set, ad, form or website, CRM routing, and downstream measurement.

Pre-launch assets

- Verified business identity and correct page access.
- Approved privacy-policy URL.
- Approved offer, audience, geographic area, and creative.
- CRM source code and routing rule.
- Response owner and service-level agreement.
- Three creative concepts and two copy variations each.
- Instant form or tested landing page.
- Conversion event and test submission.

Campaign setup sequence

- 1 Create a new campaign using the Leads objective.
- 2 Choose the conversion location: Instant Forms for lower-friction capture or Website for a controlled landing-page experience.
- 3 Choose the performance goal that matches the available data. Use lead volume only when form fills are a meaningful signal; use a qualified or conversion-lead approach only when downstream feedback is correctly connected.
- 4 Set location, age and audience rules that comply with product and platform policy.
- 5 Start with placements broad enough to learn unless there is an approved reason to restrict them.
- 6 Set a controlled test budget that the team can service.
- 7 At ad level, add approved identity, creative, primary text, headline, description and CTA.
- 8 Attach the correct Instant Form or destination page.
- 9 Add campaign tracking parameters and the CRM source code.
- 10 Submit a test lead and prove it reaches the correct CRM queue with the right timestamp and owner.
- 11 Confirm the user receives the correct confirmation and the team receives the correct alert.

- 12 Publish only after the owner and approver sign the launch checklist.

Instant Form design

Meta's official guide distinguishes higher-intent and volume-oriented form choices and recommends clear expectations, limited questions, and CRM integration. Start with higher intent when lead quality is a concern.

Form sections:

- Intro: who the organization is and what the person will receive.
- Contact fields: only necessary details.
- Qualifying questions: two to four multiple-choice questions.
- Privacy: current policy URL and required notices.
- Completion: next step, response time, and safe CTA.

Example qualifying questions for a review call, to be approved for the actual product:

- 1 Which topic would you most like to review? [Protection / retirement / business / general review]
- 2 When would you like to speak? [This week / next two weeks / later]
- 3 Preferred contact method? [Phone / email / other approved channel]

Creative test structure

Test one variable at a time where practical.

Concept	Visual	Message angle	CTA	What it tests
Problem	Relevant situation	Cost of inaction without fear claims	Learn more	Problem resonance
Process	Simple three-step graphic	What happens next	Book review	Clarity and trust
Proof	Approved evidence	Credible result or experience	Request details	Proof strength

Do not declare a winner after a few clicks. Use a predefined test window and compare downstream quality, not only click-through rate.

6. Google Search lead campaign - practical setup

Search captures existing intent. Keep keywords, ad message, landing page, and CRM source tightly aligned.

Build the keyword map

Group keywords by intent and service, not into one giant ad group.

- High intent: person actively requesting a quote, consultation, review, or provider.
- Research intent: person comparing options or learning.
- Brand intent: organization or product brand where permitted.

- Recruiting intent: candidate searching for a role or career.
- Negative intent: jobs in customer campaigns, free, complaint, login, claim status, or irrelevant product terms as appropriate.

Review actual search terms frequently and add negatives. Avoid targeting restricted or misleading terms.

Campaign setup sequence

- 1 Confirm advertiser and financial-services verification requirements for the target location.
- 2 Create a campaign with a lead objective and the correct conversion goals.
- 3 Separate customer acquisition and recruiting.
- 4 Set location using the smallest commercially valid service area.
- 5 Set the daily test budget and bidding approach based on conversion-data maturity.
- 6 Create focused ad groups around one intent cluster.
- 7 Add relevant match types and an initial negative-keyword list.
- 8 Write responsive search ads that match the intent and landing page.
- 9 Add approved assets such as sitelinks, callouts, structured snippets, phone, or lead form where eligible.
- 10 Add tracking parameters and verify the destination.
- 11 Test form submission, CRM routing, call tracking where used, and conversion recording.
- 12 Publish, then review search terms, spend, CRM quality, and lost reasons.

Google currently allows lead form assets with Search and Performance Max in eligible circumstances and requires a privacy-policy URL. Its setup guide explains the current account steps and lead-delivery options: Create Google lead form assets (<https://support.google.com/google-ads/answer/16726130?hl=en>).

Responsive search ad framework

Headlines should cover different functions rather than repeating the same phrase:

- Service and location.
- Audience or situation.
- Useful next step.
- Trust or process statement.
- Approved differentiator.
- Clear CTA.

Descriptions should explain who it is for, what happens, what is not promised, and the next action.

7. Recruiting campaigns

Recruiting is a separate CRM pipeline with different consent, claims, fields, owners, and outcomes. Do not mix candidate and customer records.

Define the candidate profile

- Required license or eligibility.
- Relevant location and work arrangement.
- Experience that is necessary versus trainable.
- Activity expectations.
- Compensation facts that are approved and can be supported.
- Training, supervision, and progression actually provided.
- Disqualifying conditions that are lawful and job-related.

Candidate funnel

- 1 Applicant received.
- 2 Minimum criteria reviewed.
- 3 Screening scheduled.
- 4 Screen completed.
- 5 Interview scheduled.
- 6 Interview completed.
- 7 Offer or next-step decision.
- 8 Accepted and onboarding.
- 9 Training complete.
- 10 First productive activity.
- 11 30-day and 90-day retention.

Measure source quality through retention and productivity, not applicant volume.

Recruiting ad structure

- Headline: role, location and real value proposition.
- Opening: who should keep reading.
- Responsibilities: observable weekly work.
- Requirements: only real minimums.
- Support: actual training, tools and management.
- Compensation: approved, accurate and not misleading.
- Process: what happens after application.
- CTA: one clear next step.

Avoid earnings promises, fake scarcity, vague entrepreneur language, or employee-versus-contractor ambiguity.

8. Lead response system inside the CRM

The campaign is only as good as the response process.

Routing rules

- Define who receives each source.
- Define business-hours and after-hours handling.
- Define round-robin, territory, language, product, or skill rules.
- Define what happens if the first owner does not accept or act.
- Define duplicate handling.
- Define overflow capacity.

Suggested response cadence

Adapt to permission, channel and local rules.

- 1 Immediate: automated acknowledgement only if approved.
- 2 First permitted human attempt: as soon as operationally possible.
- 3 Same day: follow-up through approved channels.
- 4 Next business days: planned attempts with varied timing.
- 5 Nurture: only with a valid reason, permission and dated future action.
- 6 Close: use a clear outcome and loss reason rather than leaving the record open forever.

Every attempt should record channel, outcome, meaningful note, and next action.

9. Budgeting and testing

Do not use a universal budget recommendation. Set the test budget from allowable acquisition cost, expected conversion rate, minimum learning sample, and service capacity.

Budget planning formula

Test budget = target test leads x expected cost per lead

Maximum allowable cost per sale =
expected retained contribution x allowable acquisition percentage

Maximum allowable cost per lead =
maximum allowable cost per sale x observed lead-to-sale rate

Use conservative assumptions. Do not scale from a single day or one sale.

Testing rules

- One campaign has one primary business outcome.
- Name the hypothesis before launch.
- Change one major variable at a time where possible.

- Predefine the review date and minimum evidence.
- Pause immediately for compliance, data-loss, routing, or customer-harm issues.
- Optimize creative and funnel before simply raising budget.
- Scale in controlled steps while monitoring contact capacity and quality.

10. KPI dashboard

KPI	Formula	What it diagnoses
Cost per lead	Spend / valid leads	Acquisition efficiency
Speed to first attempt	First attempt - received time	Operational response
Contact rate	Connected / valid leads	Data and follow-up quality
Qualification rate	Qualified / connected	Audience and offer fit
Appointment rate	Appointments / qualified	Sales-process conversion
Show rate	Completed meetings / booked	Reminder and commitment quality
Close rate	Sales / qualified or completed meetings	Sales effectiveness
Cost per sale	Spend / sales	Commercial efficiency
Retained contribution ROAS	Retained contribution / spend	True business return
Candidate 90-day retention	Retained hires / starts	Recruiting source quality

Segment by source, campaign, creative, audience, owner, and time period. Never compare sources using different definitions.

11. Daily and weekly optimization

Daily safety check

- Spend against budget.
- Form or website functioning.
- CRM delivery and failed records.
- Unassigned leads.
- Response SLA.
- Policy or disapproval notifications.
- Obvious spam or duplicate spike.

Weekly growth review

- 1 Review spend through retained-sale or qualified outcome.
- 2 Compare sources using the same funnel definitions.

- 3 Read loss reasons and call notes for patterns.
- 4 Choose one campaign to scale, one to repair, and one to pause.
- 5 Choose one routing or follow-up improvement.
- 6 Assign every action an owner and next review date.

12. 30-day launch plan

Week 1 - foundation

- Approve offer, audience, claims, pages, forms and follow-up.
- Define CRM fields, source names, stages and owners.
- Build landing page or Instant Form.
- Test tracking and lead routing.

Week 2 - controlled launch

- Launch one customer campaign and, only if capacity exists, one separate recruiting campaign.
- Use a controlled budget.
- Review every lead manually for data and source quality.
- Fix routing or response issues before scaling.

Week 3 - optimize quality

- Compare creative and audience using qualified outcomes.
- Improve form questions and landing-page clarity.
- Coach response owners using CRM evidence.
- Send approved downstream signals where configured.

Week 4 - decide

- Scale, repair or pause each campaign.
- Archive losing creative with the reason.
- Document the winning audience, offer, creative, follow-up and economics.
- Publish the next 30-day test plan.

13. Chapter assignment

- 1 Complete the campaign economics worksheet.
- 2 Define source naming and CRM funnel events.
- 3 Complete the compliance and approval gate.

- 4 Build one landing page or Instant Form using the provided wireframe.
- 5 Build three creative concepts and two copy variations each.
- 6 Submit a demo lead and prove routing, ownership, timestamp, consent evidence and follow-up.
- 7 Launch one controlled campaign only after sign-off.
- 8 Run the weekly growth review using CRM outcomes.

The chapter is complete when the agency can trace one unit of ad spend from campaign and creative to a CRM record, response, qualification, sale or loss reason, and retained commercial outcome.

Current official references

- Meta campaign setup for lead generation forms
(<https://about.fb.com/ltam/wp-content/uploads/sites/14/2023/11/LeadGenerationGuide.pdf>)
- Google - create lead form assets (<https://support.google.com/google-ads/answer/16726130?hl=en>)
- Google - enhanced conversions for leads (<https://support.google.com/google-ads/answer/11021502?hl=en>)
- Google - financial-services verification update for EEA markets
(<https://support.google.com/adspolicy/answer/17127726?hl=en>)
- European Commission - legal grounds for processing personal data (https://commission.europa.eu/law/law-topics/data-protection/information-business-and-organisations/legal-grounds-processing-data_en)

Platform interfaces and policies change. Recheck these primary sources and the live account notices before every launch.

EDITABLE TEMPLATE PACK

Copy these into your working documents. Replace bracketed placeholders, obtain the required approval, and connect every live process to a CRM owner and field.

Template 1 - Campaign brief

CAMPAIGN NAME: [Channel | audience | offer | month]
BUSINESS OUTCOME: [Qualified conversations / appointments / retained sales]
AUDIENCE: [Exact person and situation]
EXCLUDED AUDIENCE: [Who this is not for]
OFFER: [Useful next step]
APPROVED PROOF: [Evidence available]
PRIMARY CTA: [One action]
DESTINATION: [Landing page / approved instant form]
CRM SOURCE CODE: [Code]
ROUTING OWNER: [Name or rule]
RESPONSE SLA: [Standard]
TEST BUDGET: [Amount and period]
SUCCESS THRESHOLD: [CRM outcome and economics]
STOP CONDITIONS: [Compliance / quality / routing / cost]
APPROVER: [Name/date]

Template 2 - Campaign economics

Input	Conservative	Expected	Observed
Retained contribution per sale	[Amount]	[Amount]	[Amount]
Allowable acquisition percentage	[%]	[%]	[%]
Lead-to-connected rate	[%]	[%]	[%]
Connected-to-qualified rate	[%]	[%]	[%]
Qualified-to-sale rate	[%]	[%]	[%]
Allowable cost per sale	[Amount]	[Amount]	[Amount]
Allowable cost per lead	[Amount]	[Amount]	[Amount]
Team weekly lead capacity	[#]	[#]	[#]

Template 3 - Approval gate

☐ Advertiser identity and billing verified
☐ Product and target locations approved
☐ Required licenses and verification confirmed
☐ Claims, prices, proof and testimonials approved
☐ Creative and copy approved
☐ Landing page or form approved
☐ Privacy notice and legal basis confirmed
☐ Consent and contact-channel wording approved
☐ Tracking and cookies approved
☐ CRM data transfer approved
☐ Retention, deletion and access procedure confirmed
☐ Routing owner and response capacity confirmed
☐ Test lead completed successfully

APPROVER: [Name / role / date]

EXPIRY OR REVIEW DATE: [Date]

Template 4 - Source naming map

Channel	Campaign	Audience	Offer	Creative	CRM source code
Meta	[Name]	[Name]	[Name]	[Name]	[Code]
Google Search	[Name]	[Name]	[Name]	[Name]	[Code]
Referral	[Name]	[Name]	[Name]	[Name]	[Code]
Recruiting	[Name]	[Name]	[Name]	[Name]	[Code]

Template 5 - Landing page wireframe

EYEBROW: [Audience / location]
 HEADLINE: [Specific situation + useful next step]
 SUBHEAD: [What happens and what is not promised]

YOU WILL COVER:

- [Outcome or topic 1]
- [Outcome or topic 2]
- [Outcome or topic 3]

THIS IS FOR:

- [Fit criterion]

THIS IS NOT FOR:

- [Exclusion]

PROOF:

[Approved factual proof with source]

FORM:

[Name] [Approved contact] [Location if needed]
 [One qualification question]
 [Consent or notice where required]

BUTTON: [Request review / get details / book call]

FOOTER:

[Legal entity] [Contact] [Privacy] [Required disclosures]

Template 6 - Instant Form

FORM NAME: [Campaign and version]
 INTRO HEADLINE: [Clear value]
 INTRO TEXT: [Who this is for and what happens]
 CONTACT FIELDS: [Only necessary fields]
 QUESTION 1: [Multiple choice]
 QUESTION 2: [Multiple choice]
 QUESTION 3: [Optional]
 PRIVACY POLICY URL: [Approved URL]
 CUSTOM NOTICE: [If required]
 COMPLETION HEADLINE: [Submission received]
 COMPLETION TEXT: [Who contacts them and when]
 CTA: [Approved next action]
 CRM SOURCE CODE: [Code]

Template 7 - Customer lead ad copy angles

Angle A - process clarity

PRIMARY TEXT:

Not sure whether your current [approved topic] still matches your situation? Request a structured review covering [topic 1], [topic 2] and the next steps available to you. No outcome is guaranteed; recommendations depend on your circumstances and eligibility.

HEADLINE: Request a [Topic] Review

DESCRIPTION: Clear process. Qualified conversation. No pressure.

CTA: Learn More

Angle B - life or business change

PRIMARY TEXT:

When [approved life or business situation] changes, old assumptions may no longer fit.
 Speak with a qualified representative about what to review and which information to prepare.

HEADLINE: Has Your Situation Changed?

DESCRIPTION: See what may be worth reviewing.

CTA: Get Details

Angle C - checklist offer

PRIMARY TEXT:

Use our [approved checklist name] to prepare for a focused conversation about [topic].
 It explains the questions to ask, information to collect and what happens next.

HEADLINE: Get the [Topic] Checklist

DESCRIPTION: Practical preparation in one short guide.

CTA: Download

Replace every bracket and obtain approval. Do not use fabricated savings, urgency, guarantees, customer counts, or outcomes.

Template 8 - Meta creative matrix

Creative ID	Audience	Angle	Format	Hook	Proof	CTA	Hypothesis	Status
M-01	[Audience]	Problem	Static	[Hook]	[Proof]	[CTA]	[Hypothesis]	Draft
M-02	[Audience]	Process	Short video	[Hook]	[Proof]	[CTA]	[Hypothesis]	Draft
M-03	[Audience]	Checklist	Carousel	[Hook]	[Proof]	[CTA]	[Hypothesis]	Draft

Template 9 - Google keyword map

Intent cluster	Example keyword theme	Match approach	Landing page	Negative themes	CRM source
High intent	[Service + location]	[Approved]	[URL]	Jobs, login, complaints	[Code]
Research	[Topic comparison]	[Approved]	[URL]	Irrelevant education	[Code]
Recruiting	[Role + location]	[Approved]	[URL]	Customer terms	[Code]

Template 10 - Responsive search ad builder

HEADLINE FUNCTIONS:

1. [Service and location]
2. [Audience or situation]
3. [Useful next step]
4. [Approved proof or trust]
5. [Process differentiator]
6. [CTA]

DESCRIPTION 1:

[Who it is for] + [what happens] + [CTA]

DESCRIPTION 2:

[Topics covered] + [qualification/disclaimer if needed]

FINAL URL: [Approved page]

PATH: [Relevant path]

TRACKING: [UTM/source code]

Template 11 - Negative-keyword starting checklist

- [] Employment terms excluded from customer campaigns
- [] Customer product terms excluded from recruiting campaigns
- [] Login, support and claim-status intent reviewed
- [] Free or DIY intent reviewed
- [] Unserved locations excluded
- [] Unoffered products excluded
- [] Complaint, cancellation and service intent routed appropriately
- [] Search terms reviewed at the agreed frequency

Template 12 - Lead-routing specification

Condition	Queue or owner	Acceptance time	Reassignment rule	After-hours rule	Alert owner
[Source/region/product]	[Owner]	[Minutes]	[Rule]	[Rule]	[Name]
[Overflow]	[Owner]	[Minutes]	[Rule]	[Rule]	[Name]

Template 13 - First response scripts

Phone opening

Hello [First name], this is [Name] from [Approved organization]. You requested [offer] through [source] at approximately [time]. Is now an appropriate time for a brief conversation about what you wanted to review?

Short message

Hi [First name], [Name] from [Organization]. We received your request for [offer]. I can help with the next step. Is [option A] or [option B] better for a brief call? Reply STOP or use the approved opt-out wording where required.

Email

Subject: Your request for [offer]

Hi [First name],

Thank you for requesting [offer]. I am the person assigned to help. The first conversation covers [topic 1], [topic 2] and whether a next step is appropriate.

Would [time A] or [time B] work? You can also reply with a preferred time.

[Approved signature and disclosures]

Template 14 - Follow-up cadence planner

Timing	Channel	Purpose	Template	Owner	Stop/consent rule
Immediate	[Approved]	Acknowledge	[ID]	System/owner	[Rule]
First attempt	Phone	Connect	[ID]	Assigned user	[Rule]
Same day	[Approved]	Offer time options	[ID]	Assigned user	[Rule]
Next business day	[Approved]	Useful reminder	[ID]	Assigned user	[Rule]
Final active attempt	[Approved]	Close loop	[ID]	Assigned user	[Rule]
Nurture	[Approved]	Dated future reason	[ID]	Assigned user	[Rule]

Template 15 - Recruiting ad

ROLE: [Accurate title]

LOCATION / ARRANGEMENT: [Accurate details]

OPENING:

This role is for [candidate profile] who wants to [real work outcome].

WHAT YOU WILL DO:

- [Observable responsibility]
- [Observable responsibility]
- [Observable responsibility]

MINIMUM REQUIREMENTS:

- [Required license/eligibility]
- [Required availability/location]
- [Other lawful job-related requirement]

WHAT WE PROVIDE:

- [Actual training]
- [Actual tools]
- [Actual management support]

COMPENSATION:

[Approved, accurate structure without unsupported earnings promises]

PROCESS:

[Application -> screen -> interview -> decision]

CTA: [Apply / request details]

Template 16 - Candidate screen scorecard

Criterion	Weight	Evidence question	Score 1-5	Notes
Eligibility/license	Required	[Question]	[#]	[Evidence]
Relevant behavior	[Weight]	Tell me about...	[#]	[Evidence]
Learning discipline	[Weight]	How did you learn...	[#]	[Evidence]
Activity fit	[Weight]	Describe your weekly...	[#]	[Evidence]
Communication	[Weight]	Scenario question	[#]	[Evidence]

Template 17 - Daily ad check

DATE: [Date]
 SPEND VS PLAN: [Result]
 ADS/FORM/LANDING PAGE LIVE: [Yes/No]
 LEADS IN PLATFORM: [#]
 LEADS IN CRM: [#]
 FAILED OR DUPLICATE RECORDS: [#]
 UNASSIGNED RECORDS: [#]
 MEDIAN FIRST-ATTEMPT TIME: [Time]
 POLICY NOTICES: [None/details]
 QUALITY WARNING: [None/details]
 ACTION / OWNER / DUE: [Action]

Template 18 - Weekly campaign review

Campaign	Spend	Valid leads	Connected	Qualified	Meetings	Sales	Retained	Decision
[Name]	[Amount]	[#]	[#]	[#]	[#]	[#]	[#]	Scale/repair /pause

WHAT WORKED: [Evidence]
 WHAT FAILED: [Evidence]
 LEAD-QUALITY PATTERN: [CRM notes and loss reasons]
 ROUTING/FOLLOW-UP ISSUE: [Issue]
 ONE CAMPAIGN CHANGE: [Change / owner / date]
 ONE CRM PROCESS CHANGE: [Change / owner / date]
 NEXT REVIEW: [Date]

Template 19 - Test log

Test ID	Hypothesis	Variable	Control	Variant	Primary CRM outcome	Start	Review	Decision
[ID]	[If/then statement]	[One variable]	[A]	[B]	[Qualified/sale]	[Date]	[Date]	[Decision]

Template 20 - 30-day growth plan

WEEK 1 FOUNDATION:

[Approvals, tracking, routing, assets, test]

WEEK 2 CONTROLLED LAUNCH:

[Campaign, budget, owner, capacity]

WEEK 3 QUALITY OPTIMIZATION:

[Creative, form, audience, follow-up]

WEEK 4 DECISION:

[Scale, repair, pause, archive, next test]

PRIMARY CRM OUTCOME: [Outcome]

MAXIMUM TEST SPEND: [Amount]

STOP CONDITIONS: [Conditions]

OWNER: [Name]

APPROVER: [Name]