



Inquiry-to-booking review

An ad conversion, an inquiry, a customer and a booked job can describe different things. Use this sheet to follow one defined group of inquiries into your business records.

Review date

Reviewer / role

Review period / cohort

1. Agree what belongs in this review.

1. Define the inquiry cohort and period above, including the date through which outcomes were checked. Choose one unit: distinct inquiries. Remove duplicate contacts about the same inquiry before counting.
2. Ads conversions are tracking events. They are not automatically distinct customers or booked jobs. Confirm a booking from the actual job and scheduling records. Count an inquiry once even if it leads to several jobs.
3. Use the source recorded for that inquiry and note the evidence. If the source or booking link is unclear, keep it unknown. Do not assign an ad source simply because an ad was running.

2. Bring a count to the conversation.

Use only the chosen inquiry cohort. Counts below are inquiries, never ad events or job totals. Keep categories distinct; a blank is unknown, not zero.

Distinct inquiries reviewed

Inquiries linked to a verified booking

Other inquiries with known status

Inquiries with unknown outcome

3. List the records that need another look.

Internal reference	Booking / known / unknown	Evidence / record checked	Owner / next check

Use only internal references here. Continue longer lists in your existing records.

Known status may be a documented wait, decline or other confirmed outcome. Record the reason. Reconcile the inquiry counts without counting an inquiry twice; they do not establish advertising return or a conversion rate by themselves.



One inquiry. Follow it to a verified answer.

Use one copy for a record that still needs an answer. Confirm evidence before taking the next action.

Internal record reference

Review date

Responsible person / role

Next check date

1. Match the records.

Match the inquiry reference to the conversation, quote and actual booking. Keep the same cohort and inquiry unit. Source uncertainty and outcome uncertainty are separate questions.

Inquiry / cohort / deduplication evidence

Recorded source and evidence, or unknown

Quote / job / verified booking evidence

2. Name what is known and what is waiting.

Record the outcome supported by the evidence. A sent quote is not a booking. Preserve an unknown source even when the booking is confirmed, and respect a decline or agreed pause.

Confirmed status, or what remains unknown

Reason for waiting / evidence still needed

3. Give the next step an owner.

Next action and the person who will do it

Next check: date, record to reopen and what will confirm the answer

Give an unresolved follow-up or booking link a person and a next check. Reopen the business record at that date; do not infer customers or jobs from advertising event counts.