



YOUR AI-POWERED BUSINESS ENGINE

# Never Lose a Lead Again

The dAIsy 5-Touch Follow-Up Playbook — a step-by-step framework to capture, follow up, and convert every lead automatically.

**80%**

of sales need 5+ follow-ups

**2%**

of sales close on first  
contact

**9x**

more likely to convert within 5  
mins

## Why Leads Go Cold (And How to Stop It)

Most leads don't go cold because they lost interest. They go cold because you got busy, the timing slipped, and no one followed up. The lead moved on — to a competitor who did.

**80%**

of sales require five or more follow-ups

**2%**

of sales close on the very first contact

**9x**

more likely to convert if you respond within 5 minutes

**dAIsy fixes this at the structural level.** Every lead gets a defined sequence of touchpoints, fired automatically, at exactly the right intervals. You stay front of mind without lifting a finger.

## The 5-Touch Follow-Up Framework

Research consistently shows five touchpoints is the threshold where most service business leads convert. Here is the framework — and how to build each touch in dAIsy.

## 1 The Instant Reply

0-5 MINUTES · SMS

Speed is everything at this stage. A lead who gets a response within 5 minutes is **9x more likely to convert** than one who waits an hour.

### BUILD IT IN DAISY

Go to Automations → Add Workflow → New Lead Welcome

Trigger: Contact Created

Step 1: Send SMS immediately —

*"Hi {{contact.first\_name}}, thanks for getting in touch! I'll be with you shortly. In the meantime, here's my booking link if you'd like to grab a time: [link]"*

This fires even at 2am on a Sunday. That's your competitive edge.

## 2 The Follow-Up Email

5 MINUTES LATER · EMAIL

While the SMS establishes contact, an email gives you room to say more. Keep it personal and short.

### BUILD IT IN DAISY

Step 2 in your New Lead Workflow: Wait 5 minutes → Send Email

Subject: "Following up on your enquiry"

Body: brief intro, one key benefit, one CTA (book a call or reply to this email)

Use `{{contact.first_name}}` for personalisation — it doubles open rates

## 3 The 24-Hour Nudge

DAY 1 · SMS OR INTERNAL ALERT

If they haven't booked or replied, they may have just been busy. A gentle nudge the next day keeps you in mind without being pushy.

### BUILD IT IN DAISY

Step 3: Wait 24 hours → Internal alert IF no appointment booked

Optional second SMS:

*"Hey {{contact.first\_name}} — just checking in. Did you get a chance to look at my message? Happy to answer any questions."*

Keep it conversational. This is not a sales email — it's a conversation.

**4** **The Value Touch**  
DAY 3 · EMAIL

Stop selling and start helping. Share something genuinely useful — a tip, a case study, an insight. This builds trust and reframes you as an expert rather than a salesperson.

**BUILD IT IN DAISY**

Step 4: `Wait 3 days → Send Email (value content)`

Ideas: a common problem your clients face and how you solve it, a short case study ("We helped a business like yours achieve X"), a quick relevant tip

No hard CTA — just value. End with: "Happy to chat if this resonates — just reply to this email."

**5** **The Soft Close**  
DAY 7 · SMS OR EMAIL

This is your final automated touch. Make it clear, direct, and low-pressure.

**BUILD IT IN DAISY**

Step 5: `Wait 7 days → Send SMS or Email`

*"Hi {{contact.first\_name}} — I've reached out a few times and don't want to pester you! If you're still looking for [service], I'd love to help. If the timing isn't right, no worries at all — feel free to reach out whenever. [Booking link]"*

This message converts a surprising number of people because it respects their time.

## Building the Workflow in dAIsy

Here is the exact workflow structure to build in **Automations** → **Add Workflow** → **Start from Scratch**:

Step	Action	Timing	Channel
1	Welcome message	Immediately	SMS
2	Follow-up email	5 minutes later	Email
3	Nudge (if no booking)	24 hours later	SMS
4	Value content	3 days later	Email
5	Soft close	7 days later	SMS or Email
6	Internal alert to review	Day 7 + 1 hour	Internal task

## Pro Tips for Higher Conversion

Small details that make a measurable difference once your workflow is live.

### Always use first-name personalisation

`{{contact.first_name}}` in every message. It takes 10 seconds to set up and makes every automated message feel hand-written.

### SMS before email for new leads

SMS has a 98% open rate vs 20% for email. For the first two touches, SMS wins every time.

### One CTA per message

Every message should ask for exactly one thing. Multiple CTAs reduce conversion. Pick: book a call, reply to this email, or click this link — not all three.

### Test your workflow before going live

Create a test contact, run the workflow, and receive every message yourself. Check timing, tone, and links before it fires on real leads.

### Tag your leads by source

In dAIsy, tag every contact with where they came from (Facebook, Google, Referral, Website). After 90 days, this tells you exactly which source produces the best clients.

## Quick Win

Set up your 5-touch workflow this week. Even if you only build Touch 1 (the instant SMS reply), you will immediately stop losing leads to competitors who respond faster. Add the remaining touches one at a time.