

package.md

00-start-here/start-here.md

```
PS> boring fix lead-followup
```

```
status: practical, transparent, no hype
```

Start Here

Welcome to **The Boring Follow-Up System**.

This package helps you install a simple follow-up workflow for new leads. The goal is not to build an impressive automation stack. The goal is to make sure a real person who asks about your business gets a timely response, gets tracked somewhere, and does not disappear into your inbox.

terminal

```
new lead
```

```
→ instant response
```

```
→ CRM/pipeline record
```

```
→ follow-up reminder
```

```
→ tracked outcome
```

What this system does

This system helps you:

- capture new inquiries from forms, calls, emails, or quote requests
- send a quick confirmation or first response
- save the lead somewhere reliable
- assign a next follow-up date
- remind someone when follow-up is due
- use AI to draft, summarize, or clean up replies
- test whether the workflow actually works

What this system does not do

This system does not magically close customers.

It does not replace answering your customers. It does not know your pricing, availability, or service quality unless you give it that context. It does not fix a bad offer. It does not guarantee revenue.

It fixes a narrower, more boring problem:

People asked about your business, and your follow-up process was too slow, too messy, or too easy to forget.

That problem is worth fixing.

Who this is for

This package is for:

- local service businesses
- solo operators
- agencies
- freelancers
- consultants
- clinics and appointment-based businesses
- small teams that live in email, forms, spreadsheets, or a simple CRM
- operators who want a working system before they buy more AI tools

Who this is not for

This is probably not for you if:

- you want a done-for-you custom implementation
- you want a private coaching program
- you want a community or mastermind
- you want a complex AI agent that makes business decisions for you
- you are not willing to test the workflow with fake leads before trusting it
- you want to connect every tool you use on day one

The basic implementation flow

1. Pick your setup path.
2. Create the lead fields/pipeline.
3. Add or connect a form/intake source.
4. Add the instant response template.
5. Add the follow-up reminder.
6. Add optional AI prompts or connector support.

- 7. Submit a fake lead.
- 8. Confirm the system works end to end.
- 9. Adjust the scripts to match your business voice.

Command-line version

terminal

> boring fix lead-followup
input: new lead
output: response sent, record created, follow-up scheduled
status: boring but useful

Setup time estimate

These are rough estimates for a careful first setup:

Path	Setup time
Simple / Google Sheets	45–90 minutes
Airtable	60–120 minutes
HubSpot	60–120 minutes
Supabase / n8n technical path	2–4 hours
LLM assistant path	30–60 minutes after the core system exists

Do not rush the test step. The test step is where most broken automations reveal themselves.