

package.md

01-universal-assets/lead-fields-and-pipeline-stages.md

PS> boring fix lead-followup

status: practical, transparent, no hype

Universal Lead Fields and Pipeline Stages

These fields define the system of record. Adapt them to Google Sheets, Airtable, HubSpot, Supabase, or your CRM.

Minimum viable lead fields

Field	Purpose
Lead ID	Unique record identifier
Created At	When the lead entered the system
Lead Name	Person or contact name
Business Name	Company/business, if applicable
Email	Primary email
Phone	Primary phone number
Source	Where the lead came from
Service Requested	What they asked about
Message / Notes	Original inquiry or summary
Status	Current pipeline stage
Last Contacted At	Last outbound touch
Next Follow-Up At	When to follow up next
Assigned Owner	Who owns the response
Priority	Low / normal / high
AI Summary	Optional short summary
Missing Info	Info needed before quoting/booking
Outcome	Won / lost / dormant / not qualified

Recommended pipeline stages

Stage	Meaning
New	Lead entered the system but has not been handled yet
Responded	First response has been sent
Needs Info	Waiting for details from the lead
Qualified	Looks like a fit and needs next step
Quoted	Price/proposal/estimate sent
Booked	Appointment or project booked
Won	Customer/client acquired
Lost	Lead chose another option or was not a fit
Dormant	No response after follow-up sequence

Simple status rules

- A lead should not stay in `New` after the first response is sent.
- A lead should not have an empty `Next Follow-Up At` unless it is `Won` , `Lost` , or `Dormant` .
- A lead marked `Needs Info` should have a clear `Missing Info` value.
- A lead marked `Quoted` should have a follow-up date.
- Every lead should have an owner, even if the owner is just `Me` .

Example record

Field	Example
Lead Name	Jamie Rivera
Email	jamie@example.com
Phone	555-123-4567
Source	Website form
Service Requested	Kitchen remodel estimate
Status	Responded
Last Contacted At	2026-07-07 10:15 AM
Next Follow-Up At	2026-07-08 10:00 AM
Missing Info	Project timeline, budget range
AI Summary	Jamie wants a kitchen remodel estimate and is available next week.