



COMPLIANCE STATION · FREE EDITION

Group & Event Lead Response Checklist

How fast does a lead die in your inbox?

Every group, wedding, meeting and event inquiry answered the same day, proposed the next day, and followed up until it closes or dies on the record.

Property _____ Date _____ Walked by _____

WHAT THIS PREVENTS

The lead that arrives Friday at 4:40 and gets read Monday at 10, by which time the planner has toured two other venues. It also stops the quiet losses: the web-form lead nobody was monitoring, the open lead with no follow-up date that goes cold in the CRM, and the booked group that operations first hears about when the bus pulls up.

How to use it

1. One role owns lead response for the property (column 'Owner'). The Sales Mgr owns the system; the DOS or GM verifies it. A lead with two owners has none.
2. Every inbound channel is checked on the rhythm shown, including evenings and weekends. Coverage is a schedule with a name on it, not an intention.

A. The system — standing lead response

ITEM
☐ One role owns inbound lead response; a named backup covers every day the owner is off
☐ Written response standard posted where sales sits: acknowledgment within [VAR] hours, proposal within [VAR] business day(s), follow-up cadence
☐ Coverage calendar shows who is checking leads each day including weekends, holidays and sales-team travel
☐ Lead log (CRM or shared sheet) captures every inquiry from every channel with date, time, source, and time-to-first-response
☐ Every open lead has a next-step date and a named owner; a lead with neither is flagged
☐ Weekly pipeline review held on a fixed day and time with DOS or GM present; agenda is open leads, aging, and stalls
☐ Response-time and CRM-hygiene audit done by someone who did not work the leads that week
☐ Lost-lead reasons logged from a fixed pick-list, reviewed monthly for patterns

B. Intake — every channel monitored (first 4 of 8 items)

ITEM
☐ Web form submissions route to a shared sales inbox AND trigger a text or push alert to the on-duty responder
☐ Sales phone line rolls to a live person or a monitored voicemail; voicemail checked at [VAR]-hour intervals during business hours
☐ Front Desk and PBX know the lead-capture script: name, phone, email, event type, date, headcount, and 'someone will reach you by [VAR]'



ITEM

- ☐ Third-party lead sites (wedding, meeting and venue marketplaces) checked on schedule; lead alerts go to a monitored address, not a departed employee's

WHAT THE FULL EDITION ADDS

This free edition covers 12 of 53 line items. The full edition gives you the whole system:

- **All 7 sections, all 53 items**, from standing readiness to closing the loop.
- **A frequency on every line** (every shift, weekly, quarterly), so nothing waits for someone to remember it.
- **An owner column** naming the role responsible, so the list survives turnover and days off.
- **A pro tip on every item**: practical operator advice on what actually gets missed.
- **A sign-off block**: completed by, verified by, date and corrective actions.

SAMPLE PRO TIP

Owner is a role, not a person. 'Catering Sales Mgr, backup Front Desk lead' survives a resignation. 'Jess' does not.

Get the full checklist for \$9.99 at onawaithospitality.com/compliance-station

CHECKLIST USE NOTICE

This checklist provides operational guidance. Applicable laws, regulations, codes, and mandatory requirements always take precedence. Completing this checklist does not establish or certify regulatory compliance.

Read the full Checklist Use and Regulatory Disclaimer: onawaithospitality.com/faq