

FREE TRACKER AND SETUP GUIDE

WhatsApp Lead Follow-Up Tracker

A simple queue for keeping conversations, owners, and next actions visible.

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Build systems that make your business run better.

The tracker has one job

WhatsApp should hold the conversation. The tracker should show what happens next.

Use one row for every active lead. Every open row must have a current stage, an owner, and a next-action date. If one of those is missing, the lead is not being managed.

The daily rhythm

Spend fifteen minutes reviewing overdue actions, leads due today, and unowned conversations. Update the row immediately after the team contacts the lead.

The weekly rhythm

Review the reasons leads were won, lost, or left inactive. Look for repeated questions, unclear delivery information, and promises that the team struggles to keep.

Who owns the daily review?

What time will the team review it?

Set up the fields

Field	How to use it
Lead reference	A simple unique code. Avoid relying only on a customer name.
Source	Where the enquiry began: WhatsApp, Instagram, referral, website, or another source.
Product or request	What the person is asking about.
Stage	New enquiry, qualified, awaiting decision, payment pending, won, lost, or inactive.
Owner	The person responsible for the next action.
Last contact	The date of the most recent useful exchange.
Next action	A specific action, not a vague reminder to follow up.
Next-action date	The date the action should happen.

Use clear stages

Stages make the queue easier to scan. Keep the list short enough that two people would classify the same lead in the same way.

Score	Meaning
New	The enquiry has arrived and needs a first response.
Qualified	The request, location, and buying intent are clear.
Awaiting decision	The customer has the information needed to decide.
Payment pending	The order is agreed but payment or confirmation is outstanding.
Won	The lead became a confirmed order.
Lost	The customer chose not to continue. Record the known reason.
Inactive	The agreed follow-up sequence ended without a response.

Which stages will your team use?

Write the follow-up rule

A tracker only works when the team agrees on the rhythm. Write the rule in plain language and adjust it to match the buying cycle.

How quickly should a new enquiry receive a first response?

When should the first follow-up happen?

How many attempts should happen before a lead becomes inactive?

Which situations must be escalated to the owner?

Start with the CSV

Open the tracker in Google Sheets, Excel, Numbers, or another spreadsheet tool. Remove the example row, add your active leads, and assign the daily reviewer.

Download:

amenyo.com/guides/whatsapp-lead-follow-up-tracker

A lead is easier to manage when the next action is visible.