

YOUR WORKING FOLLOW-UP QUEUE

Organize your last 10 coaching inquiries

Give every active inquiry a clear next action and a date. Keep booked, declined and paused conversations out of the send queue.

Who this is for

Independent coaches who already receive warm questions about their coaching. Bring up to 10 recent inquiries, your actual next step and access to your own inbox or calendar.

What you need

Open the XLSX in Excel or a compatible free spreadsheet app, such as LibreOffice Calc. No CRM, paid integration or connected business account is required. If you prefer paper, use page 6 and mark the flags manually.

Start here

- 01.** Save a private working copy of **03_organize_coaching_inquiries.xlsx**. Keep the original blank file for later.
- 02.** Open **Queue**. Confirm the **Review date in B5**. It uses your spreadsheet app's current date. You can type a fixed date for a snapshot.
- 03.** Enter your last 10 warm inquiries in cream cells **A10:E19**. Use an anonymous Lead ID. Leave names and contact details in your existing system.
- 04.** Resolve the CHECK and ADD flags. Then review due items against the actual conversation before sending anything yourself.

Your finished result

Every New, Waiting or Replied record has one specific next action and a valid due date. Deferred records have an agreed review date. Stopped records receive no further sales follow-up.

USE THE QUEUE TAB

Set up the five input fields

Field	What to enter
Lead ID	A unique anonymous code, such as L001. One row per prospective client per engagement. Update that row for repeat messages.
Inquiry date	The original date they asked about your coaching. Enter a real spreadsheet date, not text.
Status	Choose one of the seven dropdown values below.
Next action	A short operational task: Answer format question, Send promised notes, or Review agreed pause. Omit personal reasons.
Due date	The date you committed to, agreed with the person, or deliberately chose after reading the conversation. There is no universal interval.

Choose the right status

Status	Meaning and next move
New	You still need to respond to the original inquiry.
Waiting	You have responded and are waiting. Record only an appropriate next step.
Replied	They have replied. Read it before choosing your next action.
Deferred	They explicitly asked for later. Record the agreed review date; outreach is paused.
Booked	Their next appointment is booked. Stop sales follow-up. Handle logistics separately.
Declined	They declined or asked for no contact. Stop outreach.
Closed	You have ended this follow-up, including a no-reply conversation you decided to close.

Keep the anonymous ID lookup private in your existing records. Do not store raw messages, coaching notes, health details or the personal reason for a pause here. A warm inquiry does not authorize adding someone to a mailing list.

FICTIONAL EXAMPLE

See the queue working

The separate **Example** tab uses a fixed review date of **06 Oct 2026**. Its records never appear in your blank Queue. These six records demonstrate different outcomes.

Lead ID	Status	Due date	Calculated flag
EX-001	New	05 Oct 2026	OVERDUE
EX-002	Waiting	06 Oct 2026	DUE TODAY
EX-003	Deferred	01 Nov 2026	DEFERRED
EX-004	Booked	04 Oct 2026	STOP
EX-005	Declined	Blank	STOP
EX-006	Replied	Blank	ADD DUE DATE

Work the example

- 01.** EX-001 asked a leadership coach about an introductory call’s format. The coach’s next action is **Answer the question about call format**. The due date has passed, so the sheet flags it for review.
- 02.** EX-002 was promised notes. The coach checks what was promised, sends the accurate material manually and updates the row to its next valid state.
- 03.** EX-003 requested November. It stays paused. On 01 Nov, the flag becomes **REVIEW DEFERRED**; the coach checks the actual instruction before deciding whether to reconnect.
- 04.** EX-004 and EX-005 are suppressed even though the booked record has an old date. EX-006 needs a chosen date before the queue is complete.

Check your copy

In a disposable copy of Example, change EX-001’s due date to 07 Oct: it should become UPCOMING. Change its status to Booked: it should become STOP. Restore the example or reopen the original.

The top counts show 3 active records, 2 due or overdue, and 1 input to fix. Deferred records are paused and excluded from the active count. These are queue counts, not a sales forecast.

ADAPT BEFORE SENDING

Three warm follow-up messages

Replace every bracket. Check the actual conversation and facts before sending manually. These templates do not set a schedule.

1 Answer the original question

Hi [first name],

Thanks for asking about [specific coaching topic]. [Answer their actual question in one or two sentences.]

If you'd like to explore whether [your actual offer] fits, [one real next step and working link, if relevant]. You can also reply here with a question.

[Your name]

2 Remind them of an agreed next step

Hi [first name],

We agreed that the next step was [specific action]. I'm checking in as planned. [Useful detail or link they need to take that step.]

If your timing has changed, let me know what would be useful.

[Your name]

3 Close the loop without pressure

Hi [first name],

I'm closing the loop on your question about [topic]. I'll leave it here for now. If you'd like to revisit [actual offer or next step], you're welcome to reply.

[Your name]

Do not use message 3 after a decline, a request for no contact, or an active pause. Do not invent scarcity, discounts, prior agreement, results or urgency. A booked person needs the logistics already agreed, not another sales prompt.

REVIEW DURING AN EXISTING ADMIN ROUTINE

Keep the queue useful

- 01.** Check **B5** is the date you mean to review. A fixed date stays fixed until you change it. To restore the current-date formula, enter **=TODAY()** in B5.
- 02.** Use the table filter on **Queue flag**. Fix CHECK RECORD, CHECK DUE DATE, ADD NEXT ACTION and ADD DUE DATE first. Record check explains missing or duplicate input details.
- 03.** Review OVERDUE and DUE TODAY against the actual conversation. Decide whether to send, wait, close or update the status. An old date alone does not mean another message is appropriate.
- 04.** After you act, update the same row immediately. A reply becomes Replied, an appointment becomes Booked, a decline becomes Declined, and an agreed pause becomes Deferred.
- 05.** Review REVIEW DEFERRED internally. Confirm that any agreed “after” date has passed and that the person still permits contact. Then choose an appropriate status and next action.

If something looks wrong

What you see	What to do
CHECK RECORD	Read Record check. Confirm the review date, unique ID, original inquiry date and dropdown status.
DUPLICATE ID	Check whether two rows describe the same inquiry. Keep one complete row; clear the duplicate inputs only after verifying.
A date looks like text	Re-enter it as a date, for example 06 Oct 2026. Confirm the app recognizes it and recalculates.
Flags do not update	Enable normal automatic calculation or recalculate in the app. No macro or external connection is needed.
You want a clean start	Save a private backup. Clear Queue A10:E109 only. Keep F:G formulas and the Example tab.

The workbook has 100 prepared rows, 10 through 109. Do not type below row 109 and assume it is included. Start another clean copy when full. If you sort, sort the whole table, never a single input column.

Final check

No active row is missing its next action or date. No duplicate ID remains. Booked, Declined and Closed show STOP. Deferred records stay paused. Your records remain in your own secure storage.

PRINT OR COPY THIS PAGE

Your manual queue

Review date: _____

Use IDs only. Add the original inquiry date beside each ID if you work on paper. Mark OVERDUE, DUE TODAY, UPCOMING, DEFERRED, REVIEW DEFERRED or STOP using the rules on pages 2–3.

Lead ID / date	Status	Next action	Due date	Flag

Optional bonus prompt

Open **03_bonus_prompt.txt** and paste its full text into ChatGPT or another compatible AI chat. It asks for missing facts before making a queue and draft messages. Use anonymous, minimal examples. Check every output against your real records. AI is optional; it does not update this workbook or send messages.

Want help connecting the steps?

Marketing PMP can help connect inquiry capture, follow-up tasks and scheduling across your existing tools.

- Explore marketing workflow automation
- Contact Marketing PMP

You can keep using this queue on its own. The complete manual process is included here.