



FREE TEMPLATE · SUMMARY

Facebook lead to booked appointment

A build template with a roofing example. The ad did its job;
now the next hour has to.





FORM AND FIELDS

Map it before the first lead.

01

Ask less

Only what the first conversation needs, plus one or two qualifying questions.

02

Fields first

Create every CRM field before you connect; dropdown labels match the form.

03

Map everything

Every question, and the tracking parameters people never see.



DUPLICATES

One contact per person.

01

Match order

Email first, then phone, or the reverse if most leads skip email.

02

On a match

Add a note and a tag, fill empty fields, leave the first source alone.

03

One sequence

No second copy of the first-five-minutes workflow.



FIRST FIVE MINUTES

Reply while they remember the ad.

01

Minute zero

Contact created or matched, source saved, an alert to the person on duty.

02

Within a minute

A confirmation text and email with a booking link.

03

Minutes two to five

A call; no booking and no reply hands off to the fallback.



FALLBACK AND LAUNCH

When the call doesn't connect.

01

Text-back

A short message with the booking link, once you know the lead was dialed.

02

Next attempts

Once more the same day, once the next morning, then stop calling.

03

Test lead

Run every path before launch, then delete the test contacts.



CONSENT · NOT LEGAL ADVICE

Keep a record of what they agreed to.

Store the wording, source and time; honor STOP and unsubscribe; keep suppression lists. Have your compliance adviser review before launch.

[Read the full template →](#)

teqprotech.com/resources/facebook-lead-to-appointment

