

6-Step Self-Assessment: Leads vs. Appointments

How to Use This Checklist: Answer each question honestly based on how your business operates today, not how you want it to work. At the end, review your answers:



Mostly “Yes” → You’re ready to build and optimize your own lead funnel.



Mostly “No” → You’ll benefit more from pre-booked appointments to save time and stress.



A mix of both → A hybrid model may bring the best ROI and stability.

Take notes in the space provided below each step to reflect on your current setup and plan next actions.

STEP 1: TEAM CAPACITY

Do you have a dedicated sales rep or call agent to handle follow-ups consistently?

- ☐ YES → Leads may work well, your team can manage outreach and nurture homeowners directly.
- ☐ NO → Appointments will save you time and remove the pressure of constant follow-up.

 Notes / Action Points:

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STEP 2: SPEED-TO-LEAD

Can your team respond to a new homeowner inquiry within minutes (not hours or days)?

- ☐ YES → Leads can deliver excellent ROI through fast response and engagement.
- ☐ NO → Appointments eliminate the speed challenge, we handle outreach for you.

 Notes / Action Points:

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STEP 3: SALES CLOSE RATE

Does your sales team close a high percentage of qualified conversations?

- ☐ YES → Appointments maximize your team’s efficiency and close rate.
- ☐ NO → Leads allow you to test, refine, and strengthen your sales approach first.

 Notes / Action Points:

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STEP 4: MARKET STRATEGY

Are you exploring new service areas or testing new verticals?

- ☐ YES → Leads give you affordable volume to experiment and learn.
- ☐ NO → Appointments keep your sales calendar steady in established markets.

 Notes / Action Points:

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STEP 5: BUDGET FLEXIBILITY

Can your business handle higher per-conversation costs in exchange for saved time and smoother operations?

- ☐ YES → Appointments may be the right fit, they cost more per opportunity but minimize labor and internal workload.
- ☐ NO → Leads are a better starting point, they require more team effort but have lower upfront costs.

 Notes / Action Points:

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STEP 6: WORK-LIFE BALANCE

Does your team have the capacity and willingness to handle evening and weekend outreach?

- ☐ YES → Leads work well, you can manage follow-ups internally and maintain control over timing.
- ☐ NO → Appointments (via HomeBuddy Call Center) are ideal, we manage outreach 7 days a week, including after-hours.

 Notes / Action Points:

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Your answers reveal where your business stands today, now it’s time to align your growth strategy. Book a free consultation to discuss how HomeBuddy’s exclusive leads and Call Center appointments can help you grow efficiently.

BOOK A FREE CONSULTATION WITH HOMEBUDDY

<https://contractor.homebuddy.com/>