

Communication Point Map

Map every external and internal touchpoint.

Related week: Week 3 | Related SOP: Manage inbox hygiene | Estimated use time: 30-45 min

Use this worksheet before building inside the CRM. Plan the path first, then build only what the plan supports.

Purpose

Use this template to map every communication point before building workflows, emails, SMS messages, reminders, or internal notifications. Communication planning starts with the lead entry path, not the automation builder.

When to Use This Template

- ☐ Before building a workflow that sends messages
- ☐ Before connecting forms or calendars to follow-up
- ☐ Before creating missed-call or no-show follow-up
- ☐ When contacts receive confusing or duplicate messages
- ☐ When the team is unsure who should respond

Lead Entry Map

Entry point	Audience	What contact expects	Source tag/value	Pipeline stage	Workflow

External Communication Map

Moment	Channel	Message purpose	Timing	Owner	Stop condition	Notes

Internal Handoff Map

Event	Who is notified	What they need to know	Expected action	Due time

Consent and Safety Check

- ☐ Contact knows what they will receive
- ☐ SMS use has clear consent and opt-out path where needed

[] Email footer/unsubscribe requirements are reviewed where needed

[] Human reply owner is assigned

[] Workflow stops when contact replies, books, opts out, or becomes a client where appropriate

Related Training and SOPs

Related training: Week 3 - Communication Points and Lead Entry Map

Related SOPs: Manage inbox hygiene; Build a safe first workflow; Build a lead capture form; Phone number setup basics