LEAD INTAKE

Capture enough to act. Not enough to annoy everyone.

A simple, reusable operating tool for teams that want clearer handoffs and less status chasing.

Use this on one real workflow

- [ ] Contact name and best contact method
- [ ] Lead source
- [ ] Service/problem requested
- [ ] Location/service area if relevant
- [ ] Urgency or desired timing
- [ ] Known decision-maker/stakeholder
- [ ] Named internal owner
- [ ] Initial stage
- [ ] Next action + due date
- [ ] Notes/files that affect qualification or handoff

Design notes

- Do not create “lead” records with only a name and phone number if the next person still has to rediscover why they called.
- Do not require fields that have no downstream use.
- If a field does not influence routing, qualification, scheduling, reporting, or handoff, question why it is required.

> **How to use it.** Do not complete this from memory in a conference room. Pull up one active or recently completed record and test the checklist against what actually happened. Any item that repeatedly needs a text, a side spreadsheet, or an owner stepping in is a candidate for workflow redesign.

Want a real answer for your workflow? Book a free 30-minute Workflow Assessment at bradleyhankins.com/contact.