

Service Business Lead Handoff SOP

A free standard operating procedure for moving leads from receptionist, dispatcher, or AI intake into the right human owner quickly and cleanly.

Owners, GMs, dispatch leads, office managers, and operators

GUIDE

A free standard operating procedure for moving leads from receptionist, dispatcher, or AI intake into the right human owner quickly and cleanly.

WHAT THIS ASSET COVERS

- A minimal SOP for who owns the lead at each stage
- Required fields before handoff
- Escalation rules for urgent, high-value, or poor-fit inquiries

USE THIS WHEN

1. Leads are getting answered but not converted
2. Multiple people touch the same inquiry
3. You are adding AI or automation and need clean human ownership

WORKING ASSET

Use this SOP to keep leads from disappearing between intake, dispatch, scheduling, estimating, and follow-up.

HANDOFF CONTRACT

A lead is not considered handed off until:

- one owner is named
- the next action is defined

- the due time is visible
- the receiving person confirms acceptance

If one of those four conditions is missing, the lead still belongs to intake.

REQUIRED RECORD FIELDS

- full name
- primary phone
- service address or market
- service/problem type
- urgency level
- source
- summary notes
- promised next step
- assigned owner
- due time for the next action

INTAKE-TO-OWNER WORKFLOW

1. Intake captures the lead in the system before the conversation ends.
2. Intake tags urgency, service type, and fit.
3. Intake assigns one receiving owner based on the routing rule.
4. Receiving owner acknowledges the handoff.
5. If acknowledgment does not happen inside the expected window, the lead escalates.

OWNERSHIP RULES

- Emergency work cannot sit unowned.
- Estimate leads need both an owner and a target follow-up date.
- Recovered missed calls do not go back into a generic pool.
- Referral-source leads should preserve the referral context in the notes.
- Once a lead is accepted, responsibility does not bounce back informally.

ESCALATION RULES

- 0-5 minutes: emergency, active-loss, or premium opportunities escalate to dispatch/on-call immediately

- 15 minutes: unaccepted standard inbound lead escalates to office lead or manager
- 60 minutes: warm estimate or consult lead without movement escalates to sales owner
- End of day: any lead without a recorded next action gets reviewed before close

ACCEPTANCE STANDARDS

The receiving owner should confirm:

- they saw the notes
- they understand the promised next step
- they know the deadline
- the record contains enough context to move without re-asking basic questions

If the record is incomplete, the owner rejects it with a missing-data reason instead of silently sitting on it.

QA REVIEW

Review at least five handoffs per week and check:

- Was the owner assignment correct?
- Were the notes sufficient?
- Did the lead wait too long before action?
- Did the customer have to repeat themselves?
- Did the final outcome match the urgency and source quality?

OWNER CHECKLIST

Use this checklist before the document gets handed to staff. The goal is to turn Lead Handoff SOP into a live operating habit, not a file that sits in a folder.

- Name the single person who owns the workflow this asset touches.
- Pull one week of real evidence before changing anything: missed calls, form timestamps, chat transcripts, text threads, booking records, CRM notes, review requests, and staff handoff messages.
- Mark every request where the customer waited too long, repeated information, received a vague next step, or dropped before booking.
- Decide whether the issue is caused by unclear language, weak ownership, missing automation, poor routing, low trust, or a broken follow-up rhythm.
- Choose one workflow to fix first. Do not try to change phone, chat, forms, CRM, reviews, and reactivation all in the same week.

- Write the current rule in plain language. If the team cannot say the rule clearly, the customer will feel that confusion.
- Decide what good looks like. Use a response-time target, a handoff target, a booking target, or a review-request target.
- Review this asset every Friday until the workflow is stable for four straight weeks.

STAFF MEETING AGENDA

Use this agenda in a 25-minute meeting with the people who answer, route, book, follow up, or manage the customer relationship.

1. Open with the customer moment this asset is meant to improve.
2. Read one recent customer example out loud without blaming anyone on the team.
3. Ask where the current process made the customer's next step slower, less clear, or less trustworthy.
4. Review the checklist and remove any item that does not affect the customer journey.
5. Assign one owner for first response, one owner for booking or follow-up, and one owner for proof capture.
6. Decide which channel gets fixed first: phone, website form, chat, text, social message, CRM task, or review request.
7. Choose one script from this document and use it live for the next seven days.
8. Schedule the next review before the meeting ends.

COPY/PASTE SCRIPTS

Use these scripts as starting points. Replace the wording with the business name, service categories, market, office hours, and escalation rules.

Fast acknowledgement: Thanks for reaching out. I have your request and I am getting the right next step in motion now. I will confirm the details before anything is booked or assigned.

Missing information: I can help with that. To route this correctly, I need the service address or location, the best callback number, what is happening, and how urgent this feels today.

Qualified but not ready: That makes sense. I do not want this to get lost. I will save the details here and follow up at the time that makes the most sense for you.

Follow-up after silence: Just checking back so this does not sit unfinished. Do you still want help with this, or should we close the request for now?

Review request after successful work: Thank you for trusting us with the work. If the experience was smooth, a short Google review helps the next customer feel more confident choosing us.

Internal handoff: New request captured. Customer need, urgency, location, source, and next action are listed below. Please confirm ownership before the opportunity cools off.

INTAKE WORKSHEET

| Field | What to Capture | Why It Matters |

|---|---|---|

| Customer name | Full name and preferred contact method | Prevents duplicate records and weak callbacks |

| Source | Phone, website, chat, referral, Google, social, repeat customer | Shows which demand channels need better routing |

| Urgency | Emergency, soon, flexible, research only | Controls response priority and staff escalation |

| Service need | Plain-language description from the customer | Helps staff avoid forcing the buyer into internal categories too early |

| Location | Address, city, service area, or remote context | Confirms fit before the team spends time on the wrong lead |

| Next step | Book, quote, call back, send info, waitlist, close | Prevents warm demand from sitting without ownership |

| Owner | Person responsible for the next action | Makes accountability visible |

| Follow-up date | Specific date and time | Turns intent into a calendar reality |

METRIC TRACKER

| Metric | Target | Review Rhythm | Owner |

|---|---:|---|---|

| First response time | Under 5 minutes for web leads and under 4 rings for calls | Daily | Front-door owner |

| Qualified next step captured | 90 percent or better | Weekly | Intake owner |

| Booking or follow-up assigned | 100 percent | Weekly | Office lead |

| Missed inquiry recovery | Same day when possible | Weekly | Follow-up owner |

| Review or proof request sent after successful work | 80 percent or better | Weekly | Reputation owner |

| Unowned open opportunities | Zero by Friday close | Weekly | Owner or manager |

DECISION RULES

- If the request is urgent, route it before collecting nice-to-have details.
- If the buyer is comparison shopping, prioritize speed, proof, and a clear next step.
- If the lead is qualified but not ready, assign follow-up instead of letting the record sit open.
- If the customer repeats information twice, the handoff failed.
- If staff are rewriting the same explanation manually, turn the explanation into a script, snippet, or automation.

- If a review request depends on memory, the business does not have a review system yet.
- If the same problem appears across phone, chat, forms, and CRM, the business needs a system fix, not another reminder.

HANDOFF SOP

Use this SOP whenever a request moves from one person, channel, or system to another.

1. Confirm the customer identity and preferred contact method.
2. Summarize the need in one sentence a new team member can understand.
3. Label urgency without exaggerating.
4. Attach the source channel so reporting stays useful.
5. Record what the customer was promised.
6. Assign the next action to a named person or system.
7. Set a follow-up time.
8. Close the loop with the customer when the next action is complete.

A handoff is not complete when the note is written. It is complete when the next owner accepts responsibility and the customer knows what will happen next.

30-DAY ROLLOUT

Week 1: Audit the current workflow. Pull real examples and mark where response, routing, trust, booking, or follow-up breaks down.

Week 2: Test the working language. Use the scripts and worksheet on live customer requests. Keep the test narrow enough that the team can actually follow it.

Week 3: Add measurement. Review first response, qualified next step, booking assignment, follow-up completion, and proof capture. Fix the weakest metric first.

Week 4: Decide what should be systemized. If the workflow now works with manual ownership, keep it as an SOP. If it still depends on memory, install automation or move it into a managed AI Business Operating System.

IMPLEMENTATION NOTES

This asset is meant to be edited. Replace generic wording with the business name, service categories, staff roles, escalation rules, pricing boundaries, service-area rules, and follow-up timing. Keep the parts that make the team faster and remove anything that adds ceremony without improving the customer journey.

The best use of Lead Handoff SOP is not to make the business look organized on paper. The best use is to make the next customer easier to answer, easier to qualify, easier to book, easier to follow up with, and easier to turn into visible proof.

DEPLOYMENT NOTES

HOW STRONG TEAMS USE THIS ASSET

- Assign one accountable owner instead of letting "Service Business Lead Handoff SOP" become shared but unmanaged work.
- Use it with owners, gms, dispatch leads, office managers, and operators in a weekly rhythm so the asset drives decisions rather than sitting in a folder.
- Decide in advance what counts as green, watch, and red performance so the team knows when to escalate.
- Capture learnings directly in the document every week so the asset becomes smarter over time instead of resetting to zero.

BEST NEXT SEQUENCE

- Leads are getting answered but not converted
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WHAT SEPARATES A SERIOUS RESOURCE FROM A BASIC TEMPLATE

- Clear ownership for every step, not generic advice without accountability.
- Targets, thresholds, or decision rules that tell the team what good looks like.
- Specific working components: A minimal SOP for who owns the lead at each stage, Required fields before handoff, Escalation rules for urgent, high-value, or poor-fit inquiries.
- A built-in review cadence so the document becomes part of operations rather than a one-time download.