THE QUIET PROTOCOL
AI SYSTEMS & AUTOMATION

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

Use this working procedure when a receptionist, website form or AI assistant passes an enquiry to a colleague. The handoff is complete when someone accepts the next action, not when a notification is sent. Adapt the roles and response windows to your actual staffing before use.

SET THE RULES BEFORE THE NEXT ENQUIRY

Name a receiving owner and backup for each request type. Agree who watches the queue during business hours, what happens after hours and when an unanswered assignment escalates. Use response windows your team can meet. Do not promise a callback time simply because a template contains one.

Keep new enquiries separate from existing-customer questions, complaints and requests outside your service area. A named person should decide unclear cases. Your AI or form can collect approved facts; it should not accept legal matters, make clinical decisions or promise a technician is on the way.

COPY THIS HANDOFF RECORD

- Enquiry ID: [one identifier shared by the receiving records].
- Received at: [date, time and time zone].
- Entry point: [phone, form, chat or other channel].
- Source and landing page: [known source and page; leave unknown when unavailable].
- Contact name and confirmed callback route: [minimum needed for the next action].
- Requested help: [the customer's words, with unclear details marked].
- Relevant location: [service area or address only when the next step needs it].

- Timing requested: [customer preference or stated deadline; not a promised appointment].
- Promise already made: [exact callback or next-step commitment, or none].
- Receiving owner and backup: [names or assigned roles].
- Next action and due time: [one action, date, time and time zone].
- Open questions: [what the receiving person still needs to confirm].
- Status: [awaiting acceptance, accepted, awaiting customer, appointment confirmed, declined or closed].

Keep sensitive documents and unnecessary personal details out of general notifications. Use the business's approved record and access controls. A long transcript can support the note but should not be the only way to find the callback number or promise made.

RUN THE HANDOFF

1. Check for an existing enquiry before creating another. Match cautiously; similar names alone are not enough to merge records.
2. Confirm the contact route and write the request without guessing missing facts.
3. Assign one receiving owner and a specific next action. Avoid leaving the record assigned only to a shared inbox.
4. Ask the receiving person to accept the task in the agreed system. Until acceptance, the sending role or queue owner remains responsible for chasing the handoff.
5. If the agreed acceptance window passes, notify the backup. If nobody can take the work, escalate to the manager and update any customer commitment honestly.
6. Record the outcome and the next owner. Stop duplicate reminders when someone replies, books, declines or asks you to stop contacting them.

HANDLE EXCEPTIONS EXPLICITLY

Wrong service or location: route to the person allowed to decline or suggest another next step. Unclear urgency: follow your approved escalation instructions; do not let a sales workflow make a safety assessment. Conflicting customer details: flag the conflict for review instead of overwriting silently. Owner unavailable: transfer responsibility explicitly and retain the original promise.

TEST IT WITH YOUR TEAM

Run one ordinary enquiry, one after-hours enquiry, one duplicate, one correction to a phone number and one unanswered assignment. Check the customer-facing message and the receiving record. Can the next person act without asking the customer to repeat everything? Does the backup actually receive an overdue task? Do notifications stop after a reply?

REVIEW THE QUEUE AND THE RESULT

At the interval your team agrees, review unaccepted tasks, overdue actions, missing callback details and repeated handoffs. Count unique enquiries rather than messages. Keep enquiry received, appointment booked, appointment attended, sales-qualified opportunity and won work separate. A submission is not proof of qualification or a sale.

TQP can help connect the receiving record, assigned person and follow-up within an agreed workflow: https://www.thequietprotocol.com/solutions/ai-business-automation

For the first-call field dictionary: https://www.thequietprotocol.com/blog/service-business-intake-data-fields-voice-ai-capture

Prepared by The Quiet Protocol, 16 October 2026. This is an adaptable operating template, not a measured client result or a promise about response times.