LEAD HANDOFF CHECKLIST

Prepare the review

Use this before passing a contact record from a campaign or research activity to the person who will follow up. It checks whether the recipient has the context and permission needed for the next action.

How to use this checklist

Save a copy, then type in the fields or print it. Review each item with the person responsible. Select Confirmed only when you can point to the relevant record or decision. Use Open when something still needs attention. Use Not applicable only with a reason. Record unresolved items, owners and dates in the action notes. Nothing is sent automatically. Keep names, contact details and full responses in your approved system. Use a record or batch reference here rather than copying personal information into the PDF.

Fictional situation - An infrastructure leader requests a migration guide but has not asked for a sales call. The handoff should show which guide was requested and arrange that delivery. A relevant job title and a content request are not, by themselves, permission to call or evidence of a sales opportunity. If a call is requested separately, record its purpose and agreed timing.

Program and approved-system record or batch reference

Up to 150 characters

Who is reviewing the handoff?

Up to 150 characters

Review date

Up to 150 characters

LEAD HANDOFF CHECKLIST

Review each item

Choose one status for each item. Confirmed means you can point to a record or decision; Open means it needs attention. Explain any Not applicable choice in the action notes. Unmarked items are not yet reviewed.

1. The account and role match the agreed criteria.

Check the written audience rules, such as company type, responsibility and region. A senior title alone is not enough. Note any mismatch for the receiving team.

◯ Confirmed ◯ Open ◯ Not applicable

2. The source and interaction date are recorded.

The recipient should be able to see where the record came from and when the person responded. Use the actual campaign or interaction reference.

◯ Confirmed ◯ Open ◯ Not applicable

3. Any requested content is named.

Identify the actual guide, article or other material the person requested, not just "download". If nothing was requested, record that rather than implying an opt-in.

◯ Confirmed ◯ Open ◯ Not applicable

4. The questions and the person's answers are available.

Preserve the wording used and the response. Keep a summary visibly separate from the original answer. Do not turn an unanswered question into an assumed need.

◯ Confirmed ◯ Open ◯ Not applicable

5. Content requests and permission for a call are recorded separately.

The record should distinguish what the person wants to receive from whether they asked for a conversation. Include the purpose and timing of any requested call.

◯ Confirmed ◯ Open ◯ Not applicable

6. The next action matches what the person agreed to.

For example, a guide request leads to sending that guide. If permission for another action is unclear, resolve it before that action is assigned.

◯ Confirmed ◯ Open ◯ Not applicable

LEAD HANDOFF CHECKLIST

Review each item

7. The record has been checked for duplicates and existing relationships.

Check whether an account owner is already speaking with the person or organization. Keep one coordinated next step rather than starting competing follow-ups.

- ◯ Confirmed
- ◯ Open
- ◯ Not applicable

8. One person owns the next action and its due date.

Name the receiving person or role and the expected action. "Sales to follow up" leaves responsibility unclear.

- ◯ Confirmed
- ◯ Open
- ◯ Not applicable

9. The receiving team can accept the handoff or return it with a reason.

Record whether it meets the agreed handoff criteria. If it is returned, note what is missing and who will resolve it; acceptance does not mean a sale occurred.

- ◯ Confirmed
- ◯ Open
- ◯ Not applicable

10. Personal data remains in the approved system.

Use approved access and sharing arrangements. This PDF is for the review and action notes, not a second contact database.

- ◯ Confirmed
- ◯ Open
- ◯ Not applicable

LEAD HANDOFF CHECKLIST

Actions and the next review

Use the item numbers to connect these notes to the checks. Save and reopen the completed copy to confirm the entries remain. Use a PDF app that supports forms if your preview does not accept typing.

What is still open, and where is the supporting record?

Up to 375 characters

Who will resolve each item, and by when?

Up to 375 characters

What can proceed, and what needs to wait?

Up to 375 characters

Review open items before the related follow-up proceeds. This checklist records readiness for an agreed action; it does not certify that a lead will buy.

Do not email a contact list or personal response data with this worksheet.