

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?

DEPLOYMENT NOTES

HOW STRONG TEAMS ACTUALLY 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 DEPLOYMENT SEQUENCE

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WHAT SEPARATES A SERIOUS VERSION 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.