Lead handoff checklist

Give the dealer enough context to make a useful first call, with clear ownership and an honest appointment status.

Use for actual PM, service or new-forklift inquiries. Keep the record proportionate to the need and share it only under the agreed permission and assignment rules.

- [ ] **01 / Expressed need**

  Record what the prospect actually requested: preventive maintenance, a service issue or a forklift purchase. A contact-list entry is not an inquiry.

- [ ] **02 / Business and location**

  Company, service location, contact name and role. Confirm that the request fits the dealer’s geography and capabilities.

- [ ] **03 / Machine or fleet context**

  Make/model and fleet size where known. For purchases, record intended use and requirements without inventing equipment specifications.

- [ ] **04 / Timing and urgency**

  Capture the requested timing and any current operational issue. Do not promise a technician slot or send a safety issue into a normal sales queue.

- [ ] **05 / Reachability and permission**

  Preferred contact method and timing; permission to share with the selected dealer. Note restrictions. Avoid unnecessary personal data.

- [ ] **06 / Questions already discussed**

  Record relevant answers, objections, missing information and anything the prospect was told. Separate their request from your interpretation.

Lead handoff checklist / continued

- [ ] **07 / Assignment and duplicates**

  Name the receiving dealer and accountable person. Check for an existing inquiry using the agreed rules. Territory exclusivity must be written, not assumed.

- [ ] **08 / Appointment state**

  Use requested, proposed, confirmed, cancelled or reschedule needed. Confirmed means the prospect accepted the time. Include timezone and event reference when available.

- [ ] **09 / Delivery acknowledgment**

  Record when the destination accepted the handoff and its reference. Retain a pending state when delivery fails; retry without creating duplicates.

- [ ] **10 / Dealer follow-up**

  Name the next owner and action. The dealer owns quoting, closing and fulfillment. A sales appointment is not a booked service visit.

Your working notes

Prospect / company / location:

Actual request / fleet context:

Permission / preferred contact:

Appointment state / timezone / reference:

Receiving owner / acknowledgment / next step:

Primary references / consulted September 27, 2026

Google Calendar · Appointment schedules

NIST · Privacy Framework