CRM & PIPELINE

Lead Ownership & Handoff Review

Fixed price: $119 **Format: 5-page sample written report** **Delivery: asynchronous**

FICTIONAL SAMPLE - NOT A REAL CLIENT

Executive snapshot

Summit Ridge Roofing, a fictional residential roofing contractor, is used to demonstrate how this service is delivered. Identify where ownership becomes unclear, duplicated, or abandoned during lead and opportunity handoffs.

Primary risk

Ownership becomes unclear after the estimate is delivered

Best next move

Assign a single accountable owner through decision or formal close.

Evidence reviewed

Assignment rules; role definitions; sample records; handoff points; escalation rules.

What this report does

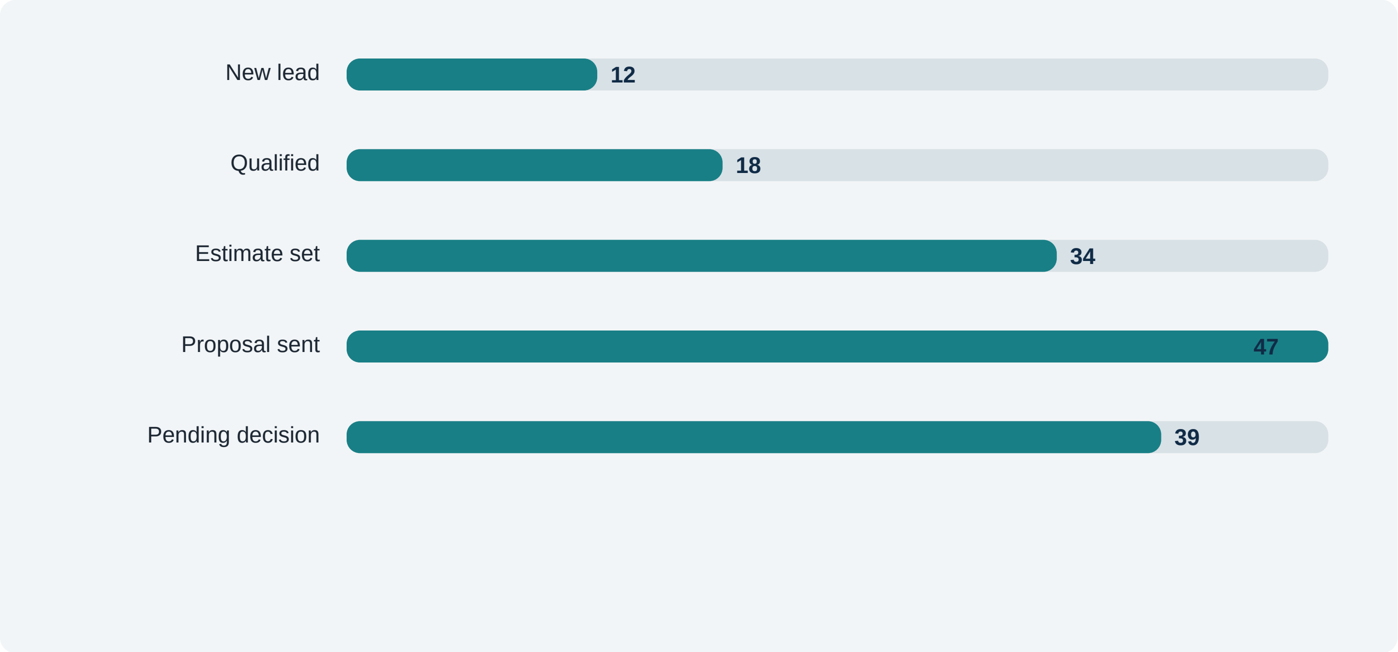
Converts the supplied evidence into prioritized operational actions without inventing ROI or revenue-loss claims.

SERVICE-SPECIFIC ANALYSIS

Current-state review

The sample analysis below uses synthetic records to show the type of evidence this service would evaluate for a real client. The numbers are illustrative, not benchmarks.

Illustrative operating data



Interpretation

Estimator ownership is assumed but not explicitly recorded after proposal delivery. Leads can sit untouched during PTO or field-heavy days. Important context is often in text/email rather than the CRM record.

PRIORITY FINDINGS

What deserves attention first

Priority reflects operational risk and controllability, not a claim about financial impact.

HIGH **Ownership becomes unclear after the estimate is delivered**

Estimator ownership is assumed but not explicitly recorded after proposal delivery.

HIGH **Backup ownership is absent when the primary rep is unavailable**

Leads can sit untouched during PTO or field-heavy days.

MEDIUM **Internal handoff notes are inconsistent**

Important context is often in text/email rather than the CRM record.

Control implication

The immediate objective is not to add complexity. It is to make the smallest number of controls visible, owned, and repeatable enough that the process can be managed consistently.

RECOMMENDED ACTIONS

30-day implementation rhythm

The sequence below is intentionally limited. Complete the control work in order, confirm adoption, and only then expand the process.

0-7 days	Assign a single accountable owner through decision or formal close.	Owner / manager
8-21 days	Add a backup owner/escalation rule for aged high-priority opportunities.	Process owner
22-30 days	Require a structured handoff note before ownership changes.	Manager review

Operating rules

- Assign one accountable owner for each action.
- Use a dated next action or review date.
- Measure only fields the team can maintain consistently.
- Do not add software or process complexity unless the current controls are actually being used.

NEXT-STEP ROADMAP

What to maintain, what to revisit

MAINTAIN	Keep the controls that are already producing reliable visibility. Do not change a working control simply to make the process look more sophisticated.
REVISIT	Review the high-priority finding after 30 days with the same evidence definition used in this report.
STOP / CLOSE	If the control is stable and the underlying question is answered, no additional paid service is required.
ESCALATE ONLY IF EVIDENCE SUPPORTS IT	A different service is appropriate only when a separate operational problem becomes visible outside this report's scope.

Limitations

This sample is illustrative. A real report would use only client-supplied or client-approved evidence, state any missing fields, and avoid unsupported conclusions.