PRECISION FILM SYSTEMS

Job Lead Assessment Sheet

Optional: use one sheet per inquiry to spot patterns in lead quality and marketing results.
Record what you know. Leave unknowns marked, and update the outcome as the job progresses.

1 INQUIRY

Date received: _____ Lead / job ID: _____ Recorded by: _____

Customer / company: _____

Property city / ZIP: _____ ☐ Residential ☐ Commercial ☐ Other

Preferred contact / details: _____

2 WHERE THE LEAD CAME FROM

First heard of the shop through: _____

What prompted this inquiry? _____

Referrer, post / ad, page or search words (if known): _____

Source evidence: ☐ Customer reported ☐ Record / tracking ☐ Unknown

3 CUSTOMER NEED AND FIT

What is the customer trying to change? Note the area and when the issue occurs.

_____

_____

Priority / desired timing: _____

Who needs to approve the work? _____

Within our area and capabilities? ☐ Yes ☐ No ☐ Needs review

Fit concerns / information still needed: _____

4 NEXT ACTION AND PROMISE

Action / update owed	Owner	Promised date / time

5 STATUS AND RESULT

Updated: _____ Quote sent: _____ Quote amount: _____

☐ Open / pending ☐ Accepted ☐ Declined ☐ Paused ☐ Closed without quote

Reason / unresolved question: _____

Reason basis: ☐ Customer stated ☐ Shop assessment ☐ Unknown

Completed date: _____ Payment status: _____

Compare several records; one lead does not prove a channel works or fails.