

RESIDENTIAL CUSTOMER INTAKE FORM

Lead Tracking · Follow-Up System · Sales Pipeline

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APPOINTMENT INFORMATION

Call-In Date _____ Appointment Day _____ Appointment Time _____

Business Card Left with Client

Job Type:

Interior Exterior Carpentry / Repairs Cabinet Painting Garage Floor

CLIENT INFORMATION

Full Name _____
 Street Address _____ City _____ Zip Code _____
 Home Phone _____ Cell Phone _____ Email Address _____
 Requested Start Date _____ Requested Finish Date _____
 How Did They Hear About Us? _____

REFERRAL TRACKING

If this client was referred by a past customer, complete this section. Issue \$50 Visa gift card upon signed contract.

Referring Customer Name _____ Referring Customer Phone _____

Gift Card Issued Pending Signed Contract

Date Gift Card Issued _____

HISTORY & FOLLOW-UP TRACKING

Date Proposal Sent / Delivered _____

Documents Sent:

Estimate / Contract Terms & Conditions References Provided

Preferred Method to Receive Proposal & Follow-Ups

Email Phone Call Text / SMS
 In Person Mail Other: _____

Best Time to Contact

Morning Afternoon Evening Anytime

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FOLLOW-UP LOG

Follow-Up #	Date	Method Used	Notes / Outcome
1st Contact			
2nd Contact			
3rd Contact			
4th Contact			

PROJECT OUTCOME

Project Awarded

Project Not Awarded

No Response

Dead File

Awarded — Date & Price

Not Awarded — Date & Reason

No Response — Date

Dead File — Date

PAYMENT TERMS

Option	At Signing	At Start / Midway	At Finish
Term #1 (Recommended)	20% Deposit	40%	40%
Term #2	1/3	1/3 (midway)	1/3
Term #3	1/2	—	1/2

Preferred Payment Method

Cash

Zelle

Venmo

Cash App

Check

Credit Card

Bank Transfer

Other: _____

FILE CLOSURE

Closed / Filed Date

Filed By

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