



TRADE LEADS UK

CLIENT LEAD SUMMARY FORM

Short client-facing summary for passing over a qualified lead clearly

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1. QUICK LEAD SUMMARY

Lead reference	[REDACTED]	Date passed	06/05/2026
Client / company receiving lead	[REDACTED]	Prepared by	Joshua
Lead type / service required	[REDACTED]	Priority / urgency	Medium

2. LEAD CONTACT DETAILS

Company / customer name	[REDACTED]
Contact name	[REDACTED]
Phone number	[REDACTED]
Email address	[REDACTED]
Location / postcode	[REDACTED]

3. PROJECT / ENQUIRY DETAILS

Project / site location	Barton Le Clay [REDACTED]
Requirement summary	Detached house, double storey side extension, size to be confirmed at site visit, drawings being prepared, planning not submitted, start in 3-6 months, good side access.
Products / services requested	Double storey side extension.
Timescale	Start 3-6 months.
Budget / value if known	To be discussed at site visit.

4. QUALIFICATION & HANDOVER NOTES

Why this lead is relevant to the client	Client has request for extensions.
Key notes from conversation / enquiry	Seems to be a large project having spoken to the client 200,000+ I would estimate.
Any exclusions, concerns or special requirements	Side access only, although given they are having side extension should be sufficient.

5. RECOMMENDED NEXT STEP

Suggested action	Contact client at your earliest convenience.
Client should respond by	Acknowledge our contact and confirm next step
Documents / attachments included	Client to provide directly
Follow-up date	06/05/2026

6. QUICK STATUS CHECKLIST

☐ Passed to client	☐ Client contacted lead
☐ Quote / call arranged	☐ Won / Lost / Pending
☐ Further info required	☐ Closed

Important: A qualified lead does not guarantee that work will be won. The client should review the opportunity, pricing, technical details and commercial suitability before proceeding.