



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	16/05/2026
Client / company receiving lead	[REDACTED]	Prepared by	Sally
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	Beaconsfield, [REDACTED]
Requirement summary	They require 4 contemporary handleless kitchens to be fitted to a new building project they are currently undertaking in Beaconsfield, HP23 8AS.
Products / services requested	Quote required for fitting only plans and images to be sent across to the direct email box.
Timescale	Within 6 weeks
Budget / value if known	TBA

4. QUALIFICATION & HANDOVER NOTES

Why this lead is relevant to the client	Builders that include kitchen fitting services, specializing in new builds.
Key notes from conversation / enquiry	The client already has the kitchens and the plans in place and ready, they require supply only.
Any exclusions, concerns or special requirements	Forward plans onto client once received.

5. RECOMMENDED NEXT STEP

Suggested action	Send quote to client asap once details received
Client should respond by	Acknowledge our contact and confirm next step
Documents / attachments included	To follow
Follow-up date	16/05/2026

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.