Play Blueprint: Lead Intake Form

Why Run It: To streamline your internal process of collecting leads via personal interaction

Who It's For: Any business that relies on face-to-face interaction should be using some type of lead intake form. This play CAN be built to “do it all” – collect leads, convert clients, and create fans – based on how you choose to design and execute it and the information you choose to gather.

Implementation time: 10-20min

Play Snapshot

A Lead Intake Form is simply an internal form you and your team can use to manually input new leads, prospects, and contacts into Keap. Traditional brick-and-mortar businesses might use this for new contacts in their physical location, but you can also tailor this form for networking events, trade shows, and even consultations generated organically.

This is the perfect solution to being able to gather the data you need from new contacts beyond simply a name, a phone number, or an email. By designing the intake form ahead of time and including the contact and/or custom fields, and other data, you can ensure fewer errors, better data, and fewer mistakes. In short, you’re creating a system, not just some notes…

Pro Tip: As much as you might want to ask hundreds of questions of this new contact, you need to make sure there’s some balance to the amount of data you’re asking them to share. A prospect might be open to providing a lot of information for a visit to a new doctor, but they’re far less open to answering twenty questions when they simply want to buy a shirt.

Quick Start Guide

Play Action Plan

Automations Bank

Measuring Success + What's Next