# The LinkedIn Lead Handoff Checklist

By Sina Dadmehr · Samsina · samsina.nl

Seven practical stages. Use the boxes to audit one real lead from capture to a booked call. A workflow concept—not a client result or a guaranteed outcome.

## 01 Capture the request

- [ ] Submit a test form. Store the lead ID, request, received time and a stable deduplication key.
- [ ] Map the required contact and company fields; flag missing values instead of inventing them.
- [ ] Record the permission state and privacy notice. Check whether nurture is permitted separately.

## 02 Enrich the company context

- [ ] Validate the company domain before matching; do not infer a company from a personal email.
- [ ] Add size, industry and country, with the source and lookup date attached.
- [ ] Flag unknown or conflicting data for review. Keep only the business context you need.

## 03 Check the tracking trail

- [ ] Save the form/campaign IDs and any available source, medium, campaign and UTM values.
- [ ] Trace one test lead to your CRM. Preserve the original source; label unavailable fields.
- [ ] Check GA4 events where applicable; never send names or email addresses in event parameters.

## 04 Use AI to suggest fit—not certainty

- [ ] Write your ICP: company size, industry, geography, relevant role and explicit exclusions.
- [ ] Require a fit score, reasons and supporting fields. Missing evidence should stay “unknown”.
- [ ] Review borderline cases. Avoid sensitive personal attributes and unsupported AI guesses.

# Make every handoff explicit.

Use a clear owner, a visible next action and a human approval gate. Route + CRM is one combined stage, so no lead falls between two systems.

## 05 Route the lead + assign CRM ownership

- ☐ High fit: create or update the deal in your CRM, assign an owner and set the next action.
- ☐ Low fit: use relevant nurture only when permitted. Send unknown or ambiguous fit to review.
- ☐ Deduplicate before writing. Test both branches; retries must not duplicate deals or erase owners.

## 06 Draft the reply; keep a human in control

- ☐ Draft from the actual request. Check the facts, tone, links and personalisation before use.
- ☐ Require a named person's approval before sending. A generated draft is not an approved reply.
- ☐ Log draft, approval and sent status separately. Include only necessary lead data in AI inputs.

## 07 Book the call and close the loop

- ☐ Offer an approved booking link or agreed next step; do not assume a lead wants a call.
- ☐ Confirm the selected slot, time zone and correct owner. Check the contact receives confirmation.
- ☐ Write the booking status back to your CRM and stop obsolete follow-ups after the call is booked.

### COMMON LEAKS TO CHECK

No owner after capture · overwritten attribution · AI guesses treated as facts · a draft marked as sent · duplicate deals after retries.

**Before switching on: run a test lead through both routes, including a missing-data case.**

## Want help building this?

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