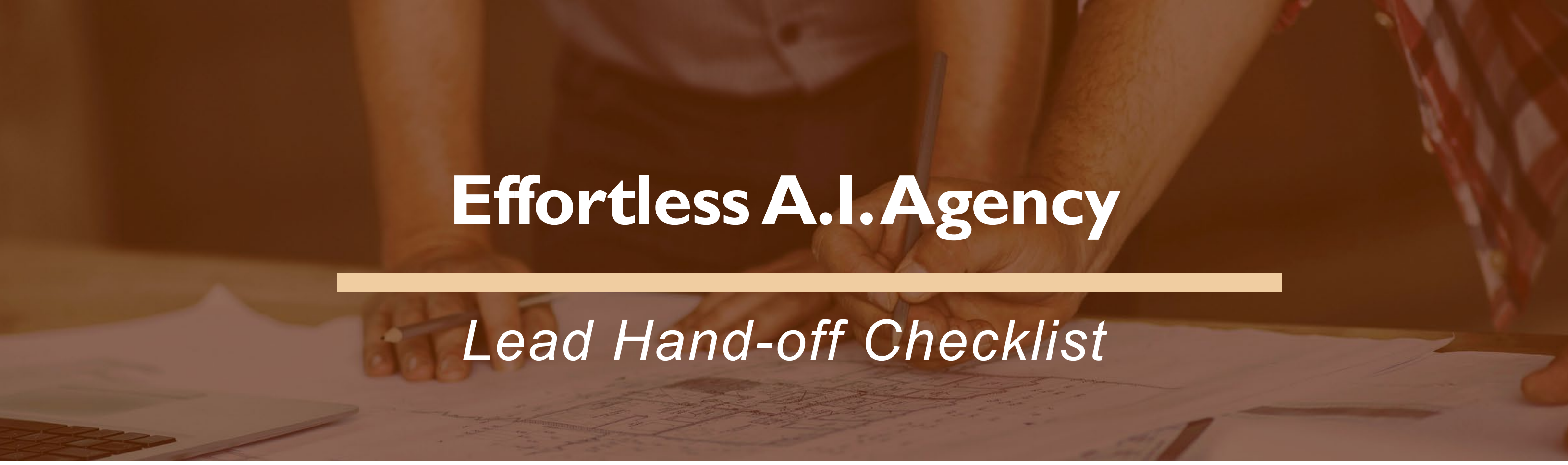

Effortless A.I. Agency

Lead Hand-off Checklist

A. Prep the Lead Package

☐ **Confirm** the lead is real. Did you see a clear need?

☐ **Gather** the basics. Name, company, phone, email, website, and rough budget range.

☐ **Write** a short pain statement. “One-liner” explaining the problem the agency can solve.

☐ **Note** any deadlines. Launch date, seasonal rush, or current ad contract ending.

B. Find & Warm Up the Right Agency

☐ **List** 3–5 agencies that already serve the lead’s industry or business size.

☐ **Check** their fit. Do they handle the service your lead needs (SEO, ads, funnels, etc.)?

☐ **Look** for a decision contact. Owner, sales director, or partnership manager.

☐ **Engage** first, ask second.

Like/comment on two of their LinkedIn posts.

Send a friendly DM: “Loved your article on local SEO wins—mind if I email you a quick idea?”

C. Put a Deal on the Table

☐ **Draft** a one-page intro email that:

States the lead’s problem.

Shows they’re ready to buy.

Offers a warm hand-off today.

☐ **Spell out your ask**. “Standard 15 % referral fee (paid on first invoice) or flat $500—whichever is higher.”

☐ **Attach** (or link) the lead sheet you built in Section A.

D. Make the Handoff

☐ **Send** a three-way email: you, the lead, and the agency contact.

☐ **Keep it simple:**

> “Dana, meet Chris at BlueSky Marketing. Chris specializes in fixing the exact issue we discussed. Chris, Dana needs new PPC campaigns before July 1. I’ll let you two connect from here.”

☐ **Confirm receipt** from both sides within 24 hours.

E. Lock Down the Commission

☐ **Get** the agreement in writing. A short PDF or email thread is fine; include payment terms.

☐ **Track** close date in a spreadsheet or free CRM.

☐ **Invoice** the agency once they sign the client (or after first payment—per the agreement).

F. Keep the Relationship Alive

☐ **Send** a quick check-in 2 weeks later: “How’s the project going?”

☐ **Pass** along a small tip or resource (article, script, template) that helps the agency shine.

☐ **Add** them to a “partner list.” Every quarter, share any new service you offer or ask what leads they need.

G. Foot-in-the-Door Tactics for New Agencies

☐ **Offer** to audit one of their smaller clients for free—show value first.

☐ **Bring** a ready-to-close lead (even tiny) on your first approach; proof you're a deal-maker, not a time-waster.

☐ **Ask** for their "perfect client" profile so the next lead you send is an even tighter fit.

PRO Tip: Agencies pay attention when money is on the table. Always walk in with a live lead, a clear problem, and your referral terms spelled out. Check every box above, and you'll turn one warm intro into a lasting, profitable partnership.