

INTAKE GAP AUDIT

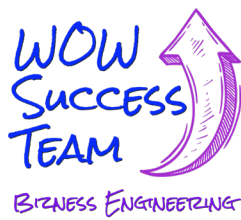
A practical worksheet for finding where interested prospects quietly disappear before they become visible, assigned, and moving toward the next step.



HOW TO USE THIS AUDIT

Choose one recent inquiry path to review. It can be a website form, call, referral, email, chat message, social message, or event follow-up. Stay specific. The goal is to find the gap, not judge the team.

- Use 0, 1, or 2 for each prompt.
- Circle the first place where ownership or visibility becomes unclear.
- Choose one small fix before redesigning the whole process.



PATH BEING REVIEWED

Inquiry source	Where did the prospect come from?
Typical first receiver	Who usually sees this inquiry first?
Current record location	Where is the inquiry captured or stored?
Expected next step	What should happen after the first response?

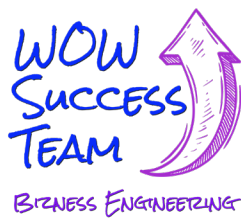
SECTION 1: CAPTURE

Review Prompt	Score	Notes
Every inquiry source has a known destination.	☐ 0 ☐ 1 ☐ 2	
Prospect details are captured without relying on copy/paste or memory.	☐ 0 ☐ 1 ☐ 2	
The team can see whether a new inquiry has arrived.	☐ 0 ☐ 1 ☐ 2	
Duplicate or scattered intake channels are easy to identify.	☐ 0 ☐ 1 ☐ 2	

Score guide: 0 = unclear or inconsistent, 1 = partly visible, 2 = clear and repeatable.

SECTION 2: OWNERSHIP

Review Prompt	Score	Notes
A clear person owns the next step after the inquiry arrives.	☐ 0 ☐ 1 ☐ 2	
Ownership does not depend on hallway conversations, forwarded messages, or assumptions.	☐ 0 ☐ 1 ☐ 2	



The owner can see the full context without searching multiple places.	☐ 0 ☐ 1 ☐ 2	
If the owner is unavailable, the backup path is clear.	☐ 0 ☐ 1 ☐ 2	

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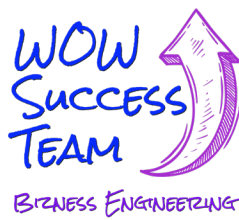
SECTION 3: STATUS VISIBILITY

Review Prompt	Score	Notes
The current status is visible to the team.	☐ 0 ☐ 1 ☐ 2	
The business can tell the difference between new, contacted, waiting, qualified, and stalled.	☐ 0 ☐ 1 ☐ 2	
A prospect cannot sit unseen because no one checked the right inbox.	☐ 0 ☐ 1 ☐ 2	
The owner can review intake status without asking several people for updates.	☐ 0 ☐ 1 ☐ 2	

Score guide: 0 = unclear or inconsistent, 1 = partly visible, 2 = clear and repeatable.

SECTION 4: NEXT ACTION

Review Prompt	Score	Notes
Every qualified inquiry has a documented next action.	☐ 0 ☐ 1 ☐ 2	
The next action has a due date or expected timing.	☐ 0 ☐ 1 ☐ 2	
Reminders support the process instead of replacing	☐ 0 ☐ 1 ☐	



ownership.	2	
The team can see which prospects need attention today.	☐ 0 ☐ 1 ☐ 2	

Score guide: 0 = unclear or inconsistent, 1 = partly visible, 2 = clear and repeatable.

YOUR INTAKE GAP SUMMARY

Strongest part of intake	What is already working well?
Biggest gap	Where does the prospect become least visible?
Likely cause	Is the gap caused by channel clutter, unclear ownership, missing status, or no next action?
Small fix to test	What is one practical change you can make this week?
Owner for the fix	Who will make or test the change?
Review date	When will you check whether the fix helped?

A SIMPLE NEXT STEP

If this audit shows that interested prospects are getting lost between interest and action, the fix may be a clearer intake path rather than more reminders.

Schedule a Get Ready, Go conversation: <https://calendly.com/wowsuccessteam/get-ready-grow>

